| Eskom | Strategy | Engineering |
|---|---|---|

Title: **Tender Technical Evaluation Strategy for Supply of Non-OEM Excitation System Field Breaker Spares**

| | |
|---|---|
| Unique Identifier: | **240-168238314** |
| Alternative Reference Number: | **N/A** |
| Area of Applicability: | **Engineering** |
| Documentation Type: | **Strategy** |
| Revision: | **2** |
| Total Pages: | **13** |
| Next Review Date: | **N/A** |
| Disclosure Classification: | **CONTROLLED DISCLOSURE** |

| Compiled by | Functional Responsibility | Authorised by |
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| Date: 04/07/2022 | Date: 04.07.2022 | Date: 07/07/2022 |

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# TABLES

# 1. INTRODUCTION

This document describes the process to be followed in performing technical evaluations during the tender evaluation for the supply of Kriel Power Station excitation system field breakers. The evaluation of tenders will be based on the tenderer's ability to meet both mandatory and qualitative requirements. A weighted score card approach will be used to evaluate the tenders against the *Employer*'s requirements.

It should be noted that the probability of getting a supplier that will be an approved agent for all the components from the various manufactures is extremely low.

# 2. SUPPORTING CLAUSES

## 2.1 SCOPE

This document refers to the Supplier Technical Evaluation and covers the different aspects that will be evaluated and scored by the Technical Evaluation Team (TET) to complete the technical evaluation of the enquiry. The team members are listed and appointed in this document along with their responsibilities. The document also describes the acceptable and unacceptable risks and qualifications and/or conditions.

The Technical Evaluation Strategy will define the following technical evaluation criteria:

- Mandatory Evaluation Criteria
- Qualitative Evaluation Criteria
- TET Member Responsibilities
- Acceptable / Unacceptable Qualifications.

Once the Technical Evaluation Strategy is finalised and authorised for issue to market, no changes will be made to the evaluation criteria.

### 2.1.1 Purpose

The purpose of this tender technical evaluation strategy is to define the Mandatory Evaluation Criteria, Qualitative Evaluation Criteria and TET member responsibilities for tender technical evaluation. The technical evaluation strategy serves as basis for the tender technical evaluation process. The criteria for strategy are aimed at answering the following questions for each tenderer:

- Capacity – Does the supplier have the bandwidth to deliver?
- Competency – Is the supplier diligent and can complete the task in each period?
- Consistency – Is there a consistent output from the supplier?
- Control of process – Does the supplier offer flexibility and have systematic control over his/her process?
- Commitment to Quality – Is there a system established by the supplier that works constantly for quality management checks?

### 2.1.2 Applicability

This Technical Evaluation Strategy is applicable to the evaluation of service providers providing spares for the excitation system field breaker at Kriel Power Station.

## 2.2 NORMATIVE/INFORMATIVE REFERENCES

Parties using this document shall apply the most recent edition of the documents listed in the following paragraphs.

### 2.2.1 Normative

[1] 240-48929482: Tender Technical Evaluation Procedure

[2] ISO 9001 Quality Management Systems

[3] 240-165891934: Supply of Non-OEM Excitation System Field Breaker Spares Scope of Work

### 2.2.2 Informative

[1] 240-48929482: Tender Technical Evaluation Procedure

## 2.3 DEFINITIONS

### 2.3.1 Classification

**Controlled Disclosure:** Controlled Disclosure to external parties (either enforced by law, or discretionary).

### 2.3.2 Enquiry

A competitive or non-competitive request for information, interest, quotations, or proposals made to a supplier, a group of suppliers or the market at large.

### 2.3.3 Tender

A tender refers to an open or closed competitive request for quotations / prices against a clearly defined scope / specification.

## 2.4 ABBREVIATIONS

| Abbreviation | Description |
|---|---|
| A&M | Assert & Management |
| ATL | Accredited Test Laboratory |
| AVR | Automatic Voltage Regulator |
| EPE | Electrical Plant Engineering |
| EMD | Electrical Maintenance Department |
| OEM | Original Equipment Manufacture |
| PT&M | Protection, Testing& Metering |
| TET | Technical Evaluation Team |

### 2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

### 2.6 PROCESS FOR MONITORING

N/A

### 2.7 RELATED/SUPPORTING DOCUMENTS

- EEP0485: Kriel Generator Replacement Scope of Work
- 240-53716746: Tender Technical Evaluation Report Template
- 240-53716712: Tender Technical Evaluation Results Form Template
- 240-53716726: Tender Technical Evaluation Scoring Form Template
- 240-53716769: Tender Technical Evaluation Strategy Template

## 3. TENDER TECHNCIAL EVALAUTION STRATEGY

### 3.1 TECHNICAL EVALUATION THRESHOLD

The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 70%.

### 3.2 TET MEMBERS

**Table 1: TET Members**

| TET number | TET Member Name | Designation |
|---|---|---|
| TET 1 | Gcina Dlamini | Generator System Engineer (EPE) |
| TET 2 | Evah Malofha | EMD Senior Advisor |
| TET 3 | Raosetene Mahlaku | EPE Senior Engineer |
| TET 4 | Roelof Strydom | PT&M Senior Supervisor |

### 3.3 MANADATORY TECHNICAL EVALUATION CRITERIA

Table 2 defines all Mandatory Evaluation Criteria to be used as well as reference to specification and motivation for use of criteria. These criteria will not be scored. Each tender will be assessed on a YES/NO basis. If any answer below is NO the tenderer may be eliminated from the tendering process.

**Table 2: Mandatory Technical Evaluation Criteria**

| No | Mandatory Technical Criteria Description | Reference to Technical Specification / Tender Returnable | Motivation for use of Criteria |
|---|---|---|---|
| 1. | The tenderer must be an approved agent for the excitation system field breakers and provides proof (OEM representative letter) of being an OEM reseller for at least 3 years. | | The components supplied must have support from the OEM through warranties |
| 2. | The tenderer provides a declaration letter signed by the company representative indicating compliance to the full scope of work. | Declaration Letter with full compliance to the requirements as set out in the scope of work | The contractor must demonstrate:<br>• Compliance to scope of work<br>• Intent to undertake full scope of work<br>• Compliance to standards and specifications if applicable |

## 3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Compliant tenderers will be evaluated against a set of weighted qualitative evaluation criteria. The evaluation criteria have been broken down into sections and a percentage weighting for each section is allocated. The Tenderer must ensure that his submission/proposal contains all relevant data/proof to substantiate the Employer's weighted criteria as populated in Table 4 . If no information from the submission file is available per criteria to be evaluated, the weighted score for those particular criteria will result in a zero without further clarification. Only information which is presented, but ambiguous to the evaluators, will be allowed for further clarification.

**Table 3: Qualitative Evaluation Criteria Scoring Table**

| Score | % | Definition |
|---|---|---|
| 5 | 100 | COMPLIANT<br>• Meet technical requirement(s) AND;<br>• No foreseen technical risk(s) in meeting technical requirements. |
| 4 | 80 | COMPLIANT WITH ASSOCIATED QUALIFICATIONS<br>Meet technical requirement(s) with;<br>1. Acceptable technical risk(s) AND/OR;<br>2. Acceptable exceptions AND/OR;<br>3. Acceptable conditions. |
| 2 | 40 | NON-COMPLIANT<br>• Does not meet technical requirement(s) AND/OR;<br>• Unacceptable technical risk(s) AND/OR;<br>• Unacceptable exceptions AND/OR;<br>• Unacceptable conditions. |
| 0 | 0 | TOTALLY DEFICIENT OR NON-RESPONSIVE |
| Note 1: Foreseen acceptable and unacceptable risk(s), exceptions and conditions shall be unambiguously defined in the relevant Tender Technical Evaluation Strategy.<br>Note 2: The scoring table does not allow for scoring of 1 and 3<br>Note 3: The minimum weighted final score (threshold) required for a tenderer to be considered from a technical perspective is 70%. | | |

**Table 4: Qualitative Technical Evaluation Criteria**

<table>
<tr><th></th><th colspan="2">Qualitative Technical Criteria Description</th><th>Reference to Technical Specification / Tender Returnable</th><th>Criteria Weighting (%)</th><th>Criteria Sub Weighting (%)</th></tr>
<tr><td>1.</td><td colspan="2">General requirements</td><td></td><td>40</td><td></td></tr>
<tr><td></td><td>1.1</td><td>The tendering entity submits a company profile which includes at least proof of 5 traceable references containing client name and contact numbers where the field breakers have been supplied; the list can be either local or international in the Power Generation, Mining or Industrial Sectors and must prove that the tenderer has supplied field breakers (see Appendix B) in the past 5 years.</td><td><table><tr><th>Number of references</th><th>Score</th></tr><tr><td>5</td><td>5</td></tr><tr><td>3-4</td><td>4</td></tr><tr><td>1-2</td><td>2</td></tr><tr><td>0</td><td>0</td></tr></table></td><td></td><td>40</td></tr>
<tr><td>2.</td><td colspan="2">Delivery and Pricing</td><td></td><td>20</td><td></td></tr>
<tr><td></td><td>2.1</td><td>Supplier provides proof that the spares will be delivered within 4 weeks; a signed letter with the company’s letterhead indicating the expected delivery period will suffice</td><td>All required spares to be delivered to the Employer 4 weeks from the day the purchase order is placed by the Employer.<table><tr><th>Delivery period (T)</th><th>Score</th></tr><tr><td>$T \leq 4\ week$</td><td>5</td></tr><tr><td>$4\ weeks < T \leq 8\ week$</td><td>4</td></tr><tr><td>$8\ weeks < T \leq 12\ week$</td><td>2</td></tr><tr><td>$T > 12\ week$</td><td>0</td></tr></table></td><td></td><td>20</td></tr>
</table>

| | | | | | |
|---|---|---|---|---|---|
| **3.** | **Quality Management System** | | | **20** | |
| | 3.1 | Submit company certification for quality management system as per ISO 9001:2015 | The quality management system of the equipment supplied must always be adhered to. Therefore, it is advised that the supplier do on-going verification of the quality management system ISO 9001:2015. | | 10 |
| | 3.2 | Letter of guarantee that spares shall meets Eskom standards as per scope and mandatory criteria | | | 10 |
| **4.** | **Documentation** | | | **20** | |
| | 4.1 | Provide batch test certificate | | | 10 |
| | 4.2 | Drawings and data sheets of equipment/components to be provided | The Supplier will supply any additional information such as brochure, general arrangement drawing, certificates, detailed specification, | | 5 |
| | 4.3 | Provide preservation procedures for components where applicable | The Supplier shall supply preservation and storage procedure/s, where applicable. | | 5 |
| | | | | **TOTAL: 100** | |

## 3.1 TET MEMBER RESPONSIBILITIES

**Table 5: TET Member Responsibilities**

| Mandatory Criteria Number | TET 1 | TET 2 | TET 3 | TET 4 |
|---|---|---|---|---|
| 1. | X | X | X | X |
| 2. | X | X | X | X |
| **Qualitative Criteria Number** | **TET 1** | **TET 2** | **TET 3** | **TET 4** |
| 1. | X | X | X | X |
| 2. | X | X | X | X |
| 3. | X | X | X | X |
| 4. | X | X | X | X |

## 3.2 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

### 3.2.1 Risks

**Table 6: Acceptable Technical Risks**

| Risk | Description |
|---|---|
| 1. | |
| 2. | |

**Table 7: Unacceptable Technical Risks**

| Risk | Description |
|---|---|
| 1. | Deviating from standard and specification captured in the Works Information/scope of work |
| 2. | Under or overrated equipment. |

### 3.2.2 Exceptions / Conditions

**Table 8: Acceptable Technical Exceptions / Conditions**

| Risk | Description |
|---|---|
| 1. | |
| 2. | |

**Table 9: Unacceptable Technical Exceptions / Conditions**

| Risk | Description |
|---|---|
| 1. | Delivery of substandard components |
| 2. | Tenderer not supplying all items in the full scope. |

## 4. AUTHORISATION

This document has been seen and accepted by:

| Name | Designation | Signature |
|---|---|---|
| Rofhiwa Nelwamondo | Engineering Manager | |
| Tsumza Tsumane | EPE Manager | |
| Simangaliso Nkosi | Senior Advisor (PT&M AVR) | |
| Evah Malofha | EMD Senior Advisor | |
| Raosetene Mahlaku | EPE Senior Engineer | |
| Roelof Strydom | PT&M Senior Supervisor | |

## 5. REVISIONS

| Date | Rev. | Compiler | Remarks |
|---|---|---|---|
| June 2022 | 2 | GT Dlamini | Revised qualitative criteria after receiving comments from procurement |
| May 2022 | 1 | GT Dlamini | First signed revision |
| May 2022 | 0 | GT Dlamini | New document |

## 6. DEVELOPMENT TEAM

The following people were involved in the development of this document:

- GT Dlamini

## 7. ACKNOWLEDGEMENTS

The author would like to thank all parties involved for their contribution.

## 8. APPENDIX B: BILL OF MATERIALS

| Sub-System | Description | Part Number | Stock No. | OEM | Minimum Stock Holding | Maximum Stock Holding |
|---|---|---|---|---|---|---|
| Excitation Control System | Field switch | UR40 Eie 82S High Speed Circuit Breaker complete with Arc Chute, 110V DC closing device, BIM6 Coil, 5 N/O and 5 N/C auxiliary switches. Each breaker is capable of 4000 amps continuous load current, up to 2000 V DC normal operating voltage | 668198 | Sécheron | 2 | 4 |