

	Strategy	Engineering
---	-----------------	--------------------

Title: **Tender Technical Evaluation
Strategy for the Oil Burner 3-
way Valves Refurbishment**

Unique Identifier:

Alternative Reference Number: **N/A**

Area of Applicability: **Engineering**

Documentation Type: **Strategy**

Revision: **2**

Total Pages: **10**

Next Review Date: **N/A**

Disclosure Classification: **CONTROLLED
DISCLOSURE**

CONTENTS

	Page
1. INTRODUCTION.....	3
2. SUPPORTING CLAUSES	3
2.1 SCOPE	3
2.1.1 Purpose.....	3
2.1.2 Applicability	3
2.2 NORMATIVE/INFORMATIVE REFERENCES.....	3
2.2.1 Normative.....	3
2.2.2 Informative	3
2.3 DEFINITIONS	4
2.3.1 Classification	4
2.4 ABBREVIATIONS	4
2.5 ROLES AND RESPONSIBILITIES.....	4
2.6 PROCESS FOR MONITORING.....	4
2.7 RELATED/SUPPORTING DOCUMENTS.....	4
3. TENDER TECHNICAL EVALUATION STRATEGY.....	5
3.1 TECHNICAL EVALUATION THRESHOLD	5
3.2 TET MEMBERS	5
3.3 MANDATORY TECHNICAL EVALUATION CRITERIA.....	6
3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA.....	6
TET MEMBER RESPONSIBILITIES.....	8
3.5 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS.....	9
3.5.1 Risks	9
3.5.2 Exceptions / Conditions	9
4. AUTHORISATION	10
5. REVISIONS.....	10
6. DEVELOPMENT TEAM.....	10
7. ACKNOWLEDGEMENTS.....	10

TABLES

Table 1: TET Members.....	5
Table 2: Mandatory Technical Evaluation Criteria	6
Table 3: Qualitative Technical Evaluation Criteria	6
Table 4: TET Member Responsibilities.....	8
Table 5: Acceptable Technical Risks.....	9
Table 6: Unacceptable Technical Risks	9
Table 7: Acceptable Technical Exceptions / Conditions.....	9
Table 8: Unacceptable Technical Exceptions / Conditions.....	9

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

1. INTRODUCTION

This Tender Technical Evaluation strategy defines the mandatory and qualitative evaluation criteria that serve as a basis for the tender evaluation process for the refurbishment and repairs of defective oil burner 3-way isolating valves at Hendrina Power Station. Various tender returnables will be evaluated based on the mandatory and qualitative criteria specified in this document, and the tenderers meeting the minimum threshold will be considered further.

2. SUPPORTING CLAUSES

2.1 SCOPE

This document covers the various technical aspects to be evaluated by the Tender Evaluation Team (TET) for the refurbishment and repairs of defective oil burner 3-way isolating valves at Hendrina Power Station.

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.

2.1.2 Applicability

This document is applicable to all relevant stakeholders involved with the technical tender evaluation process at Hendrina 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 – 168966153: Generation Tender Technical Evaluation Procedure
- [2] 240 – 48929482: Tender Technical Evaluation Procedure
- [3] Eskom Standard QM-58, Supplier Contract Quality Requirements Specification
- [4] 32 – 1033: Eskom Procurement and Supply Chain Management Policy
- [5] 32 – 1034: Eskom Procurement and Supply Chain Management Procedure
- [6] 240 – 105691858: Materials Management Safe Work Procedures Transportation Requirements for Material Handling

2.2.2 Informative

- [7] Occupational Health and Safety Act Number 85 of 1993
- [8] ISO 9001 Quality Management Systems

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

2.3 DEFINITIONS

Abbreviation	Description
SANS	South African National Standards
TET	Technical Evaluation Team

2.3.1 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
ISO	International Organisation of Standardisation
NEC	New Engineering Contract
OEM	Original Equipment Manufacturer
QCP/QIP	Quality Control Plan / Quality Inspection Plan
PS	Power Station
Rev	Revision
SA	Seal Air
SABS	South African Bureau of Standards
SANS	South African National Standards
SDL&I	Supplier Development Localization and Industrialization
SOW	Scope of Work
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

As per 240-168966153: Tender Technical Evaluation Procedure

2.6 PROCESS FOR MONITORING

N/A

2.7 RELATED/SUPPORTING DOCUMENTS

N/A

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

3. TENDER TECHNICAL EVALUATION 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%.

Table 1: Qualitative Evaluation Criteria Scoring Table

Score	(%)	Definition
5	100	COMPLIANT Meet technical requirement(s) AND. No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS Meet technical requirement(s) with. Acceptable technical risk(s) AND/OR. Acceptable exceptions AND/OR. Acceptable conditions.
2	40	NON-COMPLIANT Does not meet technical requirement(s) AND/OR. Unacceptable technical risk(s) AND/OR. Unacceptable exceptions AND/OR. Unacceptable conditions.
0	0	TOTALLY DEFICIENT OR NON-RESPONSIVE
Note 1: The scoring table does not allow for scoring of 1 and 3.		
Note 2: Foreseen acceptable and unacceptable risk(s), exceptions and conditions shall be unambiguously defined in the relevant Tender Technical Evaluation Strategy.		

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

3.2 MANADATORY TECHNICAL EVALUATION CRITERIA

Table 2: Mandatory Technical Evaluation Criteria

	Mandatory Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1.	N/A	N/A	N/A

3.3 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 3: Qualitative Technical Evaluation Criteria

Qualitative Description	Technical Criteria	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
2	Criteria 1: Company Experience		70%	
	2.1	Completed orders AND delivery notes related to the scope of work (i.e., overhauling and pressure testing of hydraulic valves) in the past 5 years. Signed off Data books that contain signed QIP's/QCP's with all relevant inspection reports. Pressure testing certificates, calibration certificates where applicable, qualifications of personnel etc. - x = 0 Completed orders: 0 points 0 > x < 3 Completed orders: 2 points 3 ≤ x < 5 Completed orders: 4 points. - x ≥ 5 Completed orders: 5 points *Note: 'x' is the number of completed orders and delivery notes		15
	2.2	Detailed, comprehensive method statement with details ranging from order received to order delivery. Detailed method statement must include, but not be limited to, the overhauling, testing, handling, transportation, and storage of fuel oil 3-way valves from the moment an order is placed by Eskom. - Not submitted or not related to the scope of work: 0 points - Method statement is basic, vague, or does not cover most of the scope of work: 2 points. - Method statement is clear, has minimal errors, and covers majority of the scope of work: 4 points. - Method statement is clearly defined, detailed, comprehensive, and covers the full scope of work: 5 points		30

Title: Tender Technical Evaluation Strategy for the Oil Burner 3- way Valves Refurbishment

Document No:

Revision: **2**

Page: **7 of 9**

	2.3	Quality Control Plan (QCP) related to the sourcing, supply, and delivery of the spares as per the scope of work.	Detailed QCP showing how quality is ensured throughout the following phases: planning, overhauling, testing, and delivery. - Not submitted or not related to the scope of work : 0 points - QCP is basic, vague, or does not cover most of the scope of work: 2 points. - QCP is clear, covers majority of the scope of work, however, is missing some hold or witness points: 4 points. - QCP is detailed, comprehensive, shows all hold points, and covers the full scope of work: 5 points		10
	2.4	Staff Qualification & CVs: the service provider to prove that they have the relevant personnel in their service and provide CVs and certified copies of qualifications.	Company organogram, personnel's CVs and certified copies of qualifications which include the following professions in the staff: Engineer/Technician/Technical manager with minimum B.Eng/B.Sc./B.Tech Mechanical and 5 years' experience, Qualified fitters with a Trade Test Certificate and minimum two years' experience, and Semi-skilled fitters with Grade 10 and 2 years valve experience, or 5 years oil/hydraulic valves experience for those without Grade 10. - None of the documents were submitted or submitted copies of qualifications were not certified: 0 points - Company organogram and CVs submitted do not include all the professions or levels of experience indicated: 2 points - Company organogram and CVs submitted include all the required professions with relevant qualifications, 2 – 4 years Engineer/Technician/Technical Manager experience with qualified fitters and semi-skilled fitters having the adequate experience: 4 points - Company organogram includes all the required professions with relevant qualifications, and adequate experience: 5 points		10
3.	Criteria 2: Supplier's premises where work will be taking place.			30%	
	3.1	Workshop Evaluation: If the tenderer has achieved at least 40% in Criteria 1 : Company Experience, an evaluation of the tenderer's workshop will be done and scored as the rest of the technical evaluation.	Signed letter indicating the company's assets that includes lapping kits, valve's test bench, general lapping machines, and a lathe machine. The workshop facility physical address must be provided, and the site visits by Eskom Personnel must be permitted. - Supplier does not have a functional workshop: 0 points - Supplier has a workshop with bad housekeeping, no required equipment and qualified personnel: 2 points - Supplier has a workshop with some required equipment including the valve's test bench, supported by both the company assets letter and the workshop visit: 4 points - Supplier has a functional workshop with all required equipment supported by both the company's assets letter and the workshop visit: 5 points		30
				TOTAL: 100	

3.4 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

3.4.1 Risks

Table 5: Acceptable Technical Risks

Risk	Description
1.	Company/individual experience with slight deviation from scope of work.
2.	Supplier has not previously worked with Eskom directly.

Table 6: Unacceptable Technical Risks

Risk	Description
1.	Supplier without relevant skills/qualifications.
2.	Non-adherence to Eskom Standards provided during supply of other Business Units.
3.	Supplier with no workshop fit to carryout the SOW on the 3-way valves.

3.4.2 Exceptions / Conditions

Table 7: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	Only qualified mechanical fitters and no semi-skilled fitters.

Table 8: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	.
2.	

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.