

	Strategy	Engineering
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1. INTRODUCTION

The intent of this document is to align Procurement Process at Kendal Power station on how the bidders will be assessed based on the technical requirements for the supply of bearings for the turbine, boiler and balance of plant

2. SUPPORTING CLAUSES

2.1 SCOPE

This document discusses the different technical aspects that will be evaluated and scored by the multi-disciplinary Technical Evaluation Team (TET) to complete the technical evaluation for Kendal Power Station for the supply of bearings. The team members who will be involved in the evaluation are listed and appointed in this document along with their responsibilities. This document also describes the acceptable and unacceptable risks and qualifications and/or conditions that will be applicable to the Scope of Work. Once the Technical Evaluation Strategy is authorised, no changes will be made to the evaluation criteria without the appropriate authorisations.

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 applies to Kendal 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] ISO 9001 Quality Management Systems

2.2.2 Informative

- [4] ISO 3290-1 2014 Rolling bearings — Balls — Part 1 Steel balls
- [5] ISO 3290-2 2014 Rolling bearings — Balls — Part 2 Ceramic balls
- [6] ISO 8443 2010 Rolling bearings — Radial ball bearings with flanged outer ring — Flange dimensions
- [7] ISO/DIS 8443 Rolling bearings — Radial ball bearings with flanged outer ring — Flange dimensions

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- [8] ISO 12044 2014 Rolling bearings — Single-row angular contact ball bearings — Chamfer dimensions for outer ring non-thrust side
- [9] ISO 19843 2018 Rolling bearings — Ceramic bearing balls — Determination of strength by notched ball test
- [10] ISO 20515 2021 Rolling bearings — Radial bearings, retaining slots — Dimensions, geometrical product specifications (GPS) and tolerance values
- [11] ISO 20516 2007 Rolling bearings — Aligning thrust ball bearings and aligning seat washers — Boundary dimensions

2.3 DEFINITIONS

2.3.1 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
N/A	Not Applicable
QMS	Quality Management System
SWL	Safe Working Load
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

N/A as per 240-48929482 Tender Technical Evaluation Procedure

2.6 PROCESS FOR MONITORING

N/A

2.7 RELATED/SUPPORTING DOCUMENTS

- [12] [11] 240-53716746 Tender Technical Evaluation Report
- [13] [12] 240-53716712 Tender Technical Evaluation Results Form
- [14] [13] 240-53716726 Tender Technical Evaluation Scoring Form
- [15] [14] 240-53716769 Tender Technical Evaluation Strategy Template

2.8 TECHNICAL EVALUATION THRESHOLD

Mandatory Technical Evaluation Criteria (gatekeepers) are 'must meet' criteria. These criteria shall not be weighted or point scored, but shall be assessed on a Yes/No basis as to whether or not the criteria are met unless set otherwise. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Qualitative Criteria.

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Qualitative Technical Evaluation Criteria are weighted evaluation criteria used to identify the highest technically ranked tenderer after determining that all the Mandatory Evaluation Criteria have been met. The Qualitative Evaluation Criteria are weighted to reflect the relevant importance of each criterion. The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 70%.

2.9 TET MEMBERS

Table 1: TET Members

TET number	TET Member Name	Designation
TET 1	Thinga Tshikovhi	System Engineer
TET 2	Mohammad Khan	System Engineer
TET 3	Sipho Nhlapo	Senior Engineer

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2.10 MANADATORY TECHNICAL EVALUATION CRITERIA

	Mandatory Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1	Provide demonstrable proof that the business is in the business of supply of bearings	Name, street and postal address, contact names and telephone numbers of the Warehouse Provide list of current bearing stock holding	To verify existence of the company and capacity to supply bearing as per the SOW.

2.11 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 2: Qualitative Technical Evaluation Criteria

	Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
1.	Technical capability				
	1 1	Supplier capability	Provide a full list of all bearings, bearing components and assemblies that will be supplied as per the scope of work (brand names, technical information)	60	70
	1 2	Handling, Storage, Tagging and Preservation procedure	Provide, storage, handling and transportation procedure (Refer to relevant OEM manuals)		15
1 3	Experience for services supplied to Eskom and other	Provide order numbers and traceable references	Provide documentation with the tender returnable	10	100

		industries for similar work, (List such Power Plants/Industries & Orders issued in the last 3 years)				
2.	Workshop Technical Assessment – Workshop Visit		N.B: Only service providers that get a minimum total weighted score (threshold) of 50% in all the other criteria’s will qualify for a Workshop Visit			
	2 1	Supplier Capability Assessment at Supplier Premises	a) Provide detailed design drawing or specification of each bearing for evaluation	a) Documentation check at the supplier premises	20	80
			b) Stock holding check at supplier premises	b) Assessment to be done at the supplier premises		20
3.	Quality Control (Execution)					
	3 1	QCP and Check Sheets	Provide sample of a signed quality control document for bearings that will be supplied Looking at quality, correctness, material certificates, assembly and machining tolerances as well as FAT's	Provide documentation with the tender returnable	10	67
	3 2	Non-conformity Management	Provide company’s non- conformity/NCR reporting procedure	Provide documentation with the tender returnable		33
					TOTAL: 100	

Table 3: Qualitative Technical Evaluation Criteria Scoring

Criteria Number	Score Percentage Description
<p>1.1, 1.2, 2 & 3</p>	<p>5 (100% of weight) COMPLIANT</p> <ul style="list-style-type: none"> • Meet technical requirement(s) AND, • No foreseen technical risk(s) in meeting technical requirements <p>4 (75% of weight) COMPLIANT WITH ASSOCIATED QUALIFICATIONS</p> <ul style="list-style-type: none"> • Meet technical requirement(s) with, • Acceptable technical risk(s) AND/OR, • Acceptable exceptions AND/OR, • Acceptable conditions <p>2 (40% of weight) NON-COMPLIANT</p> <ul style="list-style-type: none"> • Does not meet technical requirement(s) AND/OR, • Unacceptable technical risk(s) AND/OR, • Unacceptable exceptions AND/OR, • Unacceptable conditions <p>0 (0% of weight) TOTALLY DEFICIENT OR NON-RESPONSIVE</p>
<p>1.3</p>	<p>0% weight for no orders in the last 3 years</p> <p>50% weight for one order in the last 3 years</p>

	<p>75 of weight for two to three order in the last 3 years</p> <p>100% weight for more than 3 orders in the last 3 years</p>
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2.12 TET MEMBER RESPONSIBILITIES

Table 4: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2	TET 3
1	X	X	X
Qualitative Criteria Number	TET 1	TET 2	TET 3
1	X	X	X
2	X	X	X
3	X	X	X

2.13 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

2.13.1 Risks

Table 5: Acceptable Technical Risks

Risk	Description
1	
2	
3	
4	
5	
6	
7	

Table 6: Unacceptable Technical Risks

Risk	Description
1	
2	
3	
4	
5	
6	
7	

2.13.2 Exceptions / Conditions

Table 7: Acceptable Technical Exceptions / Conditions

Risk	Description
1	
1	
2	
3.	
4	
5	
6	

Table 8: Unacceptable Technical Exceptions / Conditions

Risk	Description
1	
2	
3	
4	
5	
6	
7	

3. AUTHORISATION

This document has been seen and accepted by

Name	Designation	Signature
Thinga Tshikovhi	System Engineer	
Mohammad Khan	System Engineer	

4. REVISIONS

Date	Rev.	Compiler	Remarks
Oct 2021	N/A	S Nhlapo	Final issue

5. DEVELOPMENT TEAM

The following people were involved in the development of this document

Thinga Tshikovhi

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Sipho Nhlapo

6. ACKNOWLEDGEMENTS

None

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