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Compiled by



**MJ Dlamini**  
**Boiler System Engineer**

Date:  
15/11/2022

Functional Responsibility



**Harry Mokabane**  
**Kriel Boiler Plant Engineering Manager**

Date: 2022/11/22

Authorised by



**Rofhiwa Nelwamondo**  
**Kriel Engineering Manager**

Date: 2022/11/24

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### CONTROLLED DISCLOSURE

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## **1. INTRODUCTION**

Refurbishment and Commissioning scope of work for the HP Bypass and Reheat Safety Valves Power Pack Hydraulic Unit is to be issued out on an open tender. The technical evaluation is in accordance with 32-1033: Eskom Procurement and Supply Chain Management Policy, 32-1034 Eskom Procurement and Supply Chain Management Procedure during the tender process, 240-168966153 Generation Tender Technical Evaluation Procedure, 555-EBP2020 refurbishment and commissioning of HP Bypass and Reheat Safety Valves Power Pack Unit at Kriel Power Station scope of work.

The evaluation of the tender is based on the tenderer's ability to meet both mandatory (gatekeepers) and qualitative (weighted) evaluation criteria requirements.

## **2. SUPPORTING CLAUSES**

### **2.1 SCOPE**

The scope of this document defines the technical criteria to be used to evaluate tender documents supplied by contractors to execute work defined on the scope of work 555-EBP2020 refurbishment and commissioning of HP Bypass and Reheat Safety Valves Power Pack Unit at Kriel Power Station scope of work. The acceptable and unacceptable technical risks are identified and where exceptions will be allowed it is stated.

#### **2.1.1 Purpose**

The purpose of this tender technical evaluation strategy is to define the Mandatory Evaluation Criteria, Qualitative Evaluation Criteria, TET member responsibilities for tender technical evaluation and Acceptable/Unacceptable Qualifications. The technical evaluation strategy serves as basis for the tender technical evaluation process.

#### **2.1.2 Applicability**

This document is applicable to 555-EBP2020 refurbishment and commissioning of HP Bypass and Reheat Safety Valves Power Pack Unit scope of work 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] 240-168966153: Generation Tender Technical Evaluation Procedure
- [2] 32-1033: Eskom Procurement and Supply Chain Management Policy
- [3] 32-1034: Eskom Procurement and Supply Management Procedure during the tender process

### **2.2.2 Informative**

- [4] ISO 9001: Quality Management Systems
- [5] 240:105658000: Supplier Quality Management Specification

## **2.3 DEFINITIONS**

### **2.3.1 Classification**

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

## **2.4 ABBREVIATIONS**

<b>Abbreviation</b>	<b>Description</b>
TET	Technical Evaluation Team
CQP	Contract Quality Plan
EN	Europäische Norm ("European Norm"), European Standards
HP	High Pressure
QCP	Quality Control Plan
UCLF	Unplanned Capability Loss Factor
OEM	Original Equipment Manufacturer
SOW	Scope of work

## **2.5 ROLES AND RESPONSIBILITIES**

As per 240-168966153: Generation Tender Technical Evaluation Procedure

## **2.6 PROCESS FOR MONITORING**

As per 240-168966153: Generation Tender Technical Evaluation Procedure

## **2.7 RELATED/SUPPORTING DOCUMENTS**

240-105658000 Supplier Quality Management Specification

555-EBP2020 refurbishment and commissioning of HP Bypass and Reheat Safety Valves Power Pack Unit at Kriel Power Station scope of work.

240-168966153 Generation Tender Technical Evaluation Procedure

### **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%.

#### **3.2 TET MEMBERS**

**Table 1: TET Members**

<b>TET number</b>	<b>TET Member Name</b>	<b>Designation</b>
TET 1	Mthobisi Dlamini	System Engineer
TET 2	Feyane Tivane	System Engineer
TET 3	Sindiso Kamnqa	System Engineer

### 3.3 CRITERIA

#### 3.3.1 Mandatory Technical Evaluation Criteria

**Table 2: Mandatory Technical Evaluation Criteria**

	<b>Mandatory Technical Criteria Description</b>	<b>Reference to Technical Specification / Tender Returnable</b>	<b>Motivation for use of Criteria</b>
1.	One signed off copy of the Service Provider's Quality Management System/Policy (QMS).	Technical Returnable Criteria 5	To ensure quality work is always done
2.	A signed off Environmental Management Policy of the Service provider	Environmental Compliance to storage, handling and disposal of chemical waste as found in the plant.	To always ensure proper and approved methodologies of handling by the service provider.

Note: All TET members shall independently evaluate and score each mandatory evaluation criteria for each tenderer in accordance with table 2.

### 3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA

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

Score	(%)	Definition
5	100	<b>COMPLIANT</b> <ul style="list-style-type: none"> <li>• Meet technical requirement(s) AND.</li> <li>• No foreseen technical risk(s) in meeting technical requirements.</li> </ul>
4	80	<b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS</b> Meet technical requirement(s) with. <ul style="list-style-type: none"> <li>• Acceptable technical risk(s) AND/OR.</li> <li>• Acceptable exceptions AND/OR.</li> <li>• Acceptable conditions.</li> </ul>
2	40	<b>NON-COMPLIANT</b> <ul style="list-style-type: none"> <li>• Does not meet technical requirement(s) AND/OR.</li> <li>• Unacceptable technical risk(s) AND/OR.</li> <li>• Unacceptable exceptions AND/OR.</li> <li>• Unacceptable conditions.</li> </ul>
0	0	<b>TOTALLY DEFICIENT OR NON-RESPONSIVE</b>
<p><b>Note 1:</b> The scoring table does not allow for scoring of 1 and 3.</p> <p><b>Note 2:</b> Foreseen acceptable and unacceptable risk(s), exceptions and conditions shall be unambiguously defined in the relevant Tender Technical Evaluation Strategy.</p>		

2off the TET members as defined in the Tender Technical Evaluation Strategy shall independently evaluate and score each Qualitative Evaluation Criteria for each tenderer.

Each TET members shall provide a scoring form detailing all allocated scores for each evaluated criteria for each tenderer.



**Table 4: Qualitative Technical Evaluation Criteria**

<b>Criteria</b>	<b>Weight (%)</b>	<b>0</b>	<b>2</b>	<b>4</b>	<b>5</b>
Provide ten or more completed projects with verifiable contacts	10	2 or less completed Projects	5 completed Projects	10 completed Projects	More than 10 Projects
Proof of experience of the Project Manager or Site Supervisor in the maintenance or refurbished of a hydraulic oil system or plant or similar environment.	10	One year Proof attached with no references	Two to three years Proof attached with references	Four to Five years Proof attached with references	More than five years Proof attached with references
Method Statement [1] - The criterion covers the basic steps required for the refurbishment and commission of the High-Pressure oil Power pack system.	15	not clear/generic, Non-specific methodology steps	Non-specific methodology steps	Acceptable Specific methodology steps	Clear Hydraulic oil HP Power pack Plant specific and concise
Method Statement [2] - Clearly define basic method statement or process on how the HP Bypass power pack pump arrangement (Main and Booster) will be refurbished.	15	not clear/generic	Non-specific methodology steps	Acceptable Specific methodology steps	Clear, HP Bypass power pack pump arrangement refurbishment method statement and concise
Method Statement [3] - Clearly define basic method statement or process on how to refurbish, pressure test and leak test the Oil Accumulators and the Heat Exchanger respectively.	20	not clear/generic	Non-specific methodology steps	Acceptable Specific methodology steps	clear, Oil Accumulators and Heat Exchanger Plant specific and concise
Clearly step-by-step works stipulated in the Quality Control Plan, preferably three historically fully signed-off plans to be submitted/Comprehensive new templates with all stakeholders to sign-off.	10	Inadequate QCP	Including signature matrix make provision for the following personnel in your matrix, outage coordinator, Eskom QC, Contractor's supervisor only	Only showing critical steps to be done prior to work, from method statement	QCP for the repair's execution specific and short as possible with holding points where required, signature matrix of all stakeholders
Proof of experience (No CV's) for the personnel on this project (5):	20	Mechanical Works Supervisor, one or more years – signed proof of employment/ service record only	Only provide the Project manager with 1year as minimum year of experience – signed proof of employment (contracts of employment)	N/A	Proof of relevant work experienced mechanical artisans and fitters, at least 5 personnel and the two (Supervisor and Manager) requirements.

<b>FUNCTIONALITY ( Minimum threshold of 80% to be achieved to qualify</b>		<b>Maximum points available points – 100%</b>
<b>HISTORICALLY COMPLETED PROJECTS</b>  Completed Projects or maintenance works or refurbishment on a HP Bypass Hydraulic oil Power pack Unit – Returnable – Completion certificates or Mechanical work order	The contractor must have previous experience in this type and nature of work with contactable references.	10%
	➤ Proof required is projects, client, and contact persons	
	Scoring: -	
	➤ 2 completed Projects (0)	
	➤ 5 completed Projects (2)	
➤ 10 completed Projects (4)		
➤ More than 10 Projects (5)		
<b>EXPERIENCE PROJECT MANAGER / SITE SUPERVISOR</b>  Proof of experience of the Project Manager or Site Supervisor in the maintenance or refurbished of a hydraulic oil plant or similar environment. – returnable – trade tests certificates, proof of relevant qualifications from testing institutions and actively working on a hydraulic oil system or plant or similar environment. Or on the job training	The criterion covers proof of general experience of the proposed <u>Project Manager</u> or <u>Site Supervisor</u> from trade test or on-job-training working on chemical plant	10%
	Proof of experience attached with references that can be contacted.	
Scoring: -		
One year Proof attached with no references (0)		
Two to three years Proof attached with references (2)		
Four to Five years Proof attached with references (4)		
More than five years Proof attached with references (5)		

<p><b>METHOD STATEMENT [1]:</b> <b>HIGH-PRESSURE OIL POWER PACK UNIT</b></p>	<p>The criterion covers the basic steps required for the refurbishment and commission of the High-Pressure oil Power pack system. They are used for the driving of the Servo or hydraulic oil driven actuators</p>	<p>15 %</p>
	<p>Scoring: Method statement will score a maximum 15%, following the criteria below</p>	
	<p>1. Method statement clear, specific, and concise (5)</p>	
	<p>2. Acceptable, specific steps (4)</p>	
	<p>3. Method statement not clear and found generic (2)</p>	
<p><b>METHOD STATEMENT [2]:</b> <b>HP BYPASS POWER PACK PUMP ARRANGEMENT (MAIN AND BOOSTER)</b></p>	<p>Clearly define basic method statement or process on how HP Bypass power pack pump arrangement (Main and Booster) will be refurbished.</p>	<p>15%</p>
	<p>Scoring: - Method statement will score a maximum 15%, following the criteria below</p>	
	<p>1. Method statement clear and concise (5)</p>	
	<p>2. Acceptable, specific steps (4)</p>	
	<p>3. Method statement not clear/generic (2)</p>	
<p><b>METHOD STATEMENT [3]:</b> <b>OIL ACCUMULATORS AND T HEAT EXCHANGER</b></p>	<p>Clearly define basic method statement or process on how to refurbish, pressure test and leak test the Oil Accumulators and the Heat Exchanger respectively.</p>	<p>20%</p>
	<p>Scoring: - Method statement will score a maximum 20%, following the criteria below</p>	
	<p>1. Method statement clear and concise (5)</p>	
	<p>2. Risk assessment stipulated (4)</p>	
	<p>3. Method statement not clear/generic (2)</p>	
<p><b>Quality Control Plan (4):</b></p>	<p>Clearly step-by-step works stipulated in the Quality Control Plan, preferably three historically fully signed-off plans to be submitted/Comprehensive new templates with all stakeholders to sign-off.</p>	<p>10%</p>
	<ul style="list-style-type: none"> <li>QCP for the repair's execution specific and short as possible with holding points where required, signature matrix of all stakeholders (5)</li> </ul>	

	<ul style="list-style-type: none"> <li>• Only showing critical steps to be done prior to work, from method statement (4)</li> <li>• Including signature matrix make provision for the following personnel in your matrix, outage coordinator, Eskom QC, Contractor's supervisor only (2)</li> <li>• Inadequate QCP (0)</li> </ul>	
<p><b>Proof of experience (No CV's) for the personnel on this project (5):</b></p>		
	<ul style="list-style-type: none"> <li>• Mechanical Works Technician, one or more years – signed proof of employment/ service record only (0/5)</li> <li>• Only provide the Project manager with 1 year as minimum year of experience – signed proof of employment (contracts of employment) (2/5)</li> <li>• Proof of relevant work experienced mechanical artisans and fitters, at least 8 personnel and all two requirements above (5): to submit qualification/appointment/trade certificates.             <ul style="list-style-type: none"> <li>○ No submission (0/5)</li> <li>○ Two or less than two technicians/artisans (2/5)</li> <li>○ Three to four technicians/artisans (4/5)</li> <li>○ Five to Eight mechanical technicians (5/5)</li> </ul> </li> </ul>	<p>20%</p>

### 3.5 TET MEMBER RESPONSIBILITIES

Table 3: TET Member Responsibilities

<b>Mandatory Criteria Number</b>	<b>TET 1</b>	<b>TET 2</b>	<b>TET 3</b>
3.3.1.1 QMS/Policy	X	X	X
3.3.1.2 Environment Policy	X	X	X
<b>Qualitative Criteria Number</b>	<b>TET 1</b>	<b>TET 2</b>	<b>TET 3</b>
3.3.2.1 Completed Company Projects/works	X	X	
3.3.2.2 Experience of the Project Manager	X	X	
3.3.2.3 Method statement 1	X	X	
3.3.2.4 Method statement 2	X	X	
3.3.2.5 Method statement 3	X	X	
3.3.2.6 QCP	X	X	
3.3.2.7 Personnel, experience & Qualification	X	X	

### 3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

#### Risks

**Table 4: Acceptable Technical Risks**

Risk	Description
1.	None

**Table 5: Unacceptable Technical Risks**

Risk	Description
1.	Unavailable proof of Artisan qualification

### 3.7 EXCEPTIONS / CONDITIONS

**Table 6: Acceptable Technical Exceptions / Conditions**

Risk	Description
1.	None

**Table 7: Unacceptable Technical Exceptions / Conditions**

Risk	Description
1.	Service has no ISO 14001:2015 Certification

### 3.8 AUTHORISATION

This document has been seen and accepted by:

<b>Name</b>	<b>Designation</b>	<b>Signature</b>
Feyane Tivane	System Engineer, Boiler Engineering	
Sindiso Kamnqa	System Engineer, Boiler Engineering	

### 4. REVISIONS

<b>Date</b>	<b>Rev.</b>	<b>Compiler</b>	<b>Remarks</b>
October 2022	0.1	MJ Dlamini	Draft document for tender technical evaluation criteria and document registered with documentation centre
October 2022	0.2	MJ Dlamini	Reviewed by TET members
November 2022	1	MJ Dlamini	Final Document

### 5. DEVELOPMENT TEAM

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

Feyane Tivane

### 6. ACKNOWLEDGEMENTS

None

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