

Title: **Technical evaluation strategy
supply for the supply of steam
traps**

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1. INTRODUCTION

As part of fluid handling and conditioning, steam traps play a critical role in ensuring that any accumulating of condensate is remove from the process piping ensuring that heat (energy) is utilised to keep steam conditions at desired temperature and mitigate water hammering which poses a risk of failure of the pipework system (supports).

For this reason, the steam traps are to be maintained and ensure that spares are available for maintenance intervention. Thus, a need for the station to have a contract for steam traps is a no brainer.

2. SUPPORTING CLAUSES

2.1 SCOPE

This document covers the (and is limited to) the tender technical evaluation criteria that will be used to evaluate a suitable service supplier for the supply and delivery of steam traps to Matimba power Stations for the boiler and turbine plant.

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 a basis for the tender technical evaluation process.

2.1.2 Applicability

This document is only applicable to the contract scope of works defined as **“Supply and delivery of steam traps to Matimba Power Stations”**.

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] Applicable Commercial procurement strategy
- [3] ISO 9001 Quality Management Systems.
- [4] 32-727: Eskom SHEQ Policy
- [5] 240-105658000: Supplier Quality Management: Specification
- [6] 32-1034: Eskom Procurement and Supply Management Procedure
- [7] 240-84513751 Material Specification and Certification Guideline ISO 14001 (Environment)
- [8] 240-128557196 Procurement Standard of High Pressure and High Temperature Valves in Coal Fired Stations

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2.2.2 Informative

- [1] Occupational Health and Safety (OHS) Act 85 of 193
- [2] OHSAS 18001 (Health and Safety) Standard

2.3 DEFINITIONS

Table 1: Definitions

Term	Definition
Contract(ing) Strategy	The part of the commercial strategy that governs the nature of the relationship which the employer wishes to foster with the contractor, which in turn determines the risks and responsibilities between the parties to the contract, the contract terms and conditions and the methodology by which the contractor is to be paid.
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.
Procurement	Procurement is the process which creates, manages, and fulfils contracts relating to the provision of goods, services and engineering and construction works or disposals, or any combination thereof
Procurement Strategy	Forms part of the commercial strategy and sets out estimated pricing, pre-qualification criteria, procurement mechanism, evaluation processes and any other element of the procurement process for a transaction.
Tender	A tender refers to an open or closed competitive request for quotations / prices against a clearly defined scope / specification.

2.4 ABBREVIATIONS

Table 2: Abbreviations

Abbreviation	Description
CV	Curriculum Vitae
HP	High Pressure
ISO	International Organization for Standardization
RH	Reheater
SANAS	South African National Accreditation System
SHEQ	Safety, Health, Environment, and Quality
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

The roles and responsibility are defined as per the Tender Engineering Evaluation Procedure 24048929482)

2.6 PROCESS FOR MONITORING

N/A

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2.7 RELATED/SUPPORTING DOCUMENTS

[1] Applicable Commercial procurement strategy

3. TENDER TECHNICAL EVALUATION STRATEGY

The technical evaluation begins with mandatory (Table 4) evaluation followed by the qualitative evaluation (Table 6) as illustrated in Figure 1 with the scoring matrix defined in Table 5. For the mandatory stage, a tenderer is required to have met the mandatory criteria as per Table 4 to advance to the qualitative stage

3.1 TECHNICAL EVALUATION THRESHOLD

The minimum weighted final score (threshold) required for a tender to be considered from a technical qualitative is 75% for a supplier/tenderer to be considered.

The importance of the steam traps in their application has been mentioned in the introduction of this document. Therefore, the 75% threshold will ensure that Eskom will receive the correct steam traps for the applicable functional location from the supplier or tenderer with sound technical knowledge.

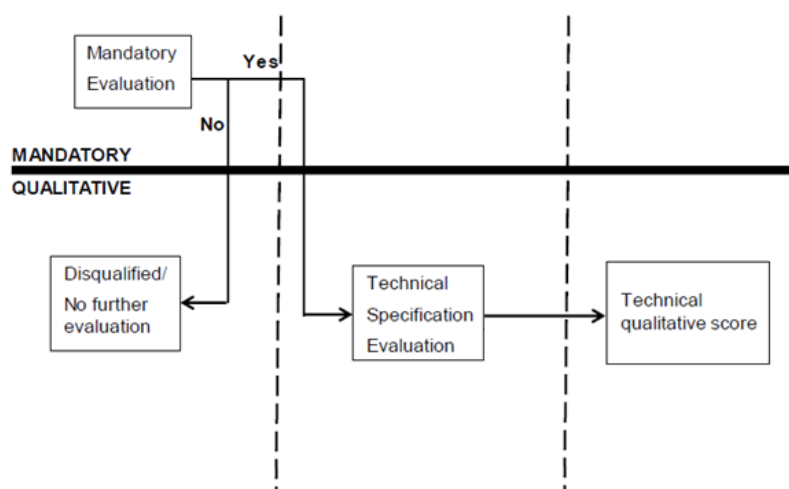


Figure 1: Technical Evaluation Process

3.2 TET MEMBERS

Table 3: TET Members

TET number	TET Member Name	Designation
TET 1	Mkhulu Mokoena	Senior. Engineer
TET 2	Joseph Molekoe/Peter Tseke	Senior Artisan

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3.3 MANADATORY TECHNICAL CRITERIA

The mandatory requirement outlined on the table below shall be met for a tenderer to continue to the qualitative stage of the process as depicted in Figure 1, otherwise the tenderer will be disqualified.

Table 4: Mandatory Technical criteria

Mandatory Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria	Scoring of Criteria	Mandatory Outcome
1	Technical data sheet	Tenderer shall submit technical data sheet for all thirteen (13) line items. In the event of technical data sheet showing multiple range of specification, the tenderer is required to indicate in the technical data sheet which technical specification is applicable for each line. The technical data sheet should be that of the specified or required technical specification. Submitted technical data sheet will be reviewed on the qualitative stage to determine If they meet technical specification for each line.	Required to ensure to be supplied are of the correct specification	Submitted ALL (13) technical data sheet	YES
				No submission/partial submission on technical data sheet OR submission do not qualify as technical data sheet	NO
2	General arrangement (GA) drawing	Tenderer shall submit general arrangement (GA) drawings for all thirteen (13) line items. In the event of GA drawing showing multiple range of specification (dimensions/sizes and rating), the tenderer is required to indicate in the GA drawing which dimensions/sizes and ratings is applicable for each line. Submitted GA drawing will be reviewed to determine If they meet technical specification for each line. GA drawing that does not meet or satisfy the technical specification would mean that the mandatory requirement is not met.	Required to ensure to be supplied are of the correct specification	Submitted ALL (13) GA drawing	YES
				No submission/partial submission on GA drawing OR submission do not qualify as GA drawing	NO
NOTE: Product brochure will not be accepted, data sheet needs to be explicit and specific to the required technical specifications. If a GA drawing is generic and showing a multiple range of technical specification, the applicable specification for each line shall be indicated explicitly in the GA drawing.					

3.4 QUALITATIVE TECHNICAL CRITERIA

The qualitative technical criteria are three elements (with their respective weighting percentage), i.e.,

1. Technical requirements – Technical data sheet (50%), and
2. Technical requirements – General arrangement (GA) drawing (50%)

The qualitative technical criteria will be scored as per table 5 scoring matrix.

Table 5: Qualitative technical criteria scoring

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

Table 6: Qualitative Technical Evaluation Criteria – Technical data sheet

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Score	Weight (%)
1	TECHNICAL REQUIREMENTS – TECHNICAL DATA SHEET (50%)			
1.1	Technical data sheet of steam trap to be supplied on each line, this is the technical data sheet submitted on the mandatory requirements. The technical data sheet must contain as a minimum, the type of steam trap, ends connections type and size with applicable standard, pressure and temperature rating, and body material. Each technical data sheet will be reviewed to ensure compliance to technical specification.	Submitted all technical data sheet on all (each line specification) lines and all thirteen (13) of the submitted technical data sheets meet minimum requirements	5	50
		Submitted all technical data sheet on all (each line specification) lines and only ten (10) of the submitted technical data sheets meet minimum requirements	4	40
		Submitted all technical data sheet on all (each line specification) lines and only five (5) of the submitted technical data sheets meet minimum requirements	2	20
		Submitted all technical data sheet on all (each line specification) lines and only four (4) or less than four (4) of the submitted technical data sheets meet minimum requirements OR no submission/totally nonresponsive	0	0

Table 7: Qualitative Technical Evaluation Criteria – General arrangement drawing

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Score	Weight (%)
2	TECHNICAL REQUIREMENTS – GENERAL (GA) DRAWING (50%)			
2.2	General arrangement (GA) drawings for each line of specification. The GA must contain a bill of material (BOM)/parts list with material specification on all parts with their respective standards. NOTE: Product generic GA drawings form product brochure shall only be accepted ONLY If the relevant specification is explicitly indicated.	Submitted all GA drawing on all (each line specification) lines and all thirteen (13) of the GA drawing meet minimum requirements	5	50
		Submitted all GA drawing on all (each line specification) lines and only ten (10) of the submitted GA drawing meet minimum requirements	4	40
		Submitted all GA drawing on all (each line specification) lines and only five (5) of the submitted GA drawing meet minimum requirements	2	20
		Submitted all GA drawing on all (each line specification) lines and only four (4) or less than four (4) of the submitted GA drawing meet minimum requirements OR no submission/totally nonresponsive	0	0

3.5 TET MEMBER RESPONSIBILITIES

Table 8: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2
1. Technical data sheet	X	X
2. General arrangement drawing	X	X
Qualitative Criteria Number	TET 1	TET 2
1. Technical data sheet	X	X
2. General arrangement drawing	X	X

3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

3.6.1 Risks

Table 9: Acceptable Technical Risks

Risk	Description
1.	There are no foreseeable risks that are identified at the time of compiling this document.

Table 10: Unacceptable Technical Risks

Risk	Description
1.	There are no foreseeable risks that are identified at the time of compiling this document, thus no unacceptable technical risks

3.6.2 Exceptions / Conditions

Table 11: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	There are no exceptions to be made as these spares are met for a critical plant. The technical criterion is clear and concise and within the operational parameters of any entity that is within the business of steam trap.

Table 12: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	None

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5. AUTHORISATION

This document has been seen and accepted by:

Name	Designation
Mkhulu Mokoena	Senior Engineer
Riaan Nel	Boiler Engineering Manager
Jacky Mathobela	Engineering Manager

6. REVISIONS

Date	Rev.	Compiler	Remarks
2025/06/30	0	M. Mokoena	New document
2026/05/26	1	M. Mokoena	Revise mandatory criteria after CFT Revise qualitative criteria after CFT Revise qualitative criteria threshold after CFT

7. DEVELOPMENT TEAM

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

- M. Mokoena

8. ACKNOWLEDGEMENTS

None

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