

	<b>Strategy</b>	<b>Engineering</b>
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## **1. INTRODUCTION**

An invite issued, calling for interested parties to participate in the tender process for design and construction of the Drainage, Access and Terracing at the Ash Dump Workshop, Substation and Surrounds at Medupi Power Station. This includes certification of the works as complete by issuing a completion certificate in terms of the Construction Regulations (most recent edition). This document sets out the method and criteria that will be used to evaluate the tenders that will result from this pre-qualification invite.

## **2. SUPPORTING CLAUSES**

### **2.1 SCOPE**

This strategy defines the TET, their responsibilities and the criteria to be used to evaluate the tenders received from interested parties.

#### **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 strategy document applies to Medupi Power Station project.

## **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] 32-1034: Eskom Procurement Policy
- [3] ISO 9001 Quality Management Systems

### **2.2.2 Informative**

- [4] 240-53113685: Design Review Procedure
- [5] 240-53114026: Project Engineering Change Management Procedure

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- [6] 348-9987487: Medupi Design & Construction Scope of Works – Drainage, Access and Terracing at the Ash Dump Workshop, Substation and Surrounds

## 2.3 DEFINITIONS

Definition	Description
Contractor/Tenderer	Refers to the corporation appointed to perform the engineering, procurement, and construction works required for the project.
Employer	Refers to Eskom Holdings State Owned Company
Eskom Plant Engineering	Refers to the Eskom Engineering team who will perform the reviews and provide technical assistance for the work performed by the appointed Contractor.
Specification	The document/s forming part of the contract in which the methods of executing the various items of work to be done is described, as well as the nature and quality of the materials to be supplied and it includes technical schedules and drawings attached thereto as well as all samples and patterns
The Client	The end user will be Eskom who will be represented by Medupi Power Station throughout the duration of the Project.

### 2.3.1 Classification

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

## 2.4 ABBREVIATIONS

Abbreviation	Description
CSY	Coal Stock Yard
CV	Curriculum Vitae
ECSA	Engineering Council of South Africa
EDWL	Engineering Design Work Lead
LDE	Lead Discipline Engineer
PBS	Plant Breakdown Structure
SHEQ	Safety, Health, Environmental and Quality

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SoW	Scope of Works
TET	Technical Evaluation Team

## **2.5 ROLES AND RESPONSIBILITIES**

Compiler	The document compiler is responsible for ensuring that this document is up-to-date and that this document is not a duplication of an existing documentation, regarding the document's objectives and content.
Functional Responsibility	The Functional Responsible Person shall determine if the document is fit for purpose, before the document is submitted for authorisation.
Authoriser (Senior Manager)	The document authoriser is a duly delegated person with the responsibility to review the document for alignment to business strategy, policy, objectives and requirements. He/she shall authorise the release and application of the document.
EDWL	The EDWL is responsible to manage the execution and adherence to this procedure. Typically on New Build projects the EDWL role is fulfilled by the Lead Discipline Engineer (LDE) and on existing asset projects the EDWL role is fulfilled by the relevant System Engineer / Plant Engineer
Lead Discipline Engineers	Provide input to the technical tender evaluation strategy and associated engineering activities.
Configuration Management Lead	Is accountable for ensuring that the engineering documentation, engineering systems and databases are correctly configured. As part of this role, the Configuration Practitioner is responsible for the development of the configuration management plan; configuration and management of the PBS and the management of plant item Tags.

## **2.6 PROCESS FOR MONITORING**

The primary process for monitoring will be governed by Design Review Procedure (240-53113685), this entails assuring that the design achieves the requirements set out in this document.

## **2.7 RELATED/SUPPORTING DOCUMENTS**

Refer to Section 2.2.

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### **3. TENDER TECHNICAL EVALUATION STRATEGY**

#### **3.1 TECHNICAL EVALUATION METHOD**

The basic steps for a technical evaluation must be followed as per the Tender Technical Evaluation Procedure [1].

A two stage Technical Evaluation Strategy is set out.

**Stage 1:** 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. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Qualitative Criteria.

**Stage 2:** 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%.

A weighted score-card approach is used to evaluate the technical compliance of the tenders against the specifications. The evaluation of the tender submission will be based on the tenderer's ability to meet the Engineering requirements.

**Table 1: Scoring Method**

<b>SCORE</b>	<b>PERCENTAGE</b>	<b>DESCRIPTION</b>
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> <ul style="list-style-type: none"><li>• Meet technical requirement(s) with;</li><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; 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>

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The evaluation scores will be weighted as follows according to disciplines:

**Table 2: Evaluation Scores**

Technical (100%)	
Civil	100%
TOTAL (100%)	
Overall minimum threshold for qualification (70%)	

### 3.2 TECHNICAL EVALUATION THRESHOLD

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

### 3.3 TET MEMBERS

**Table 3: TET Members**

TET number	Designation	Name and Surname
TET 1	LDE: Civil Engineering	
TET 2	Engineer: Civil Engineering	
TET 3	Engineer: Civil Engineering	

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### 3.4 MANDATORY TECHNICAL EVALUATION CRITERIA

In order to be eligible for evaluation the tenderer shall meet the gatekeepers specified on the table below:

**Table 4: Mandatory Evaluation Criteria**

	<b>Mandatory Technical Criteria Description</b>	<b>Source of Evidence</b>	<b>Motivation for use of Criteria</b>
3.4.1.	Certification of the drainage design works for the Drainage, Access and Terracing at the Ash Dump Workshop, Substation and Surrounds	Letter of intent from Tenderer to appoint a Professional Engineer/ Technologist to provide professional services as designer in accordance to, Construction Regulations, Occupational Health and Safety Act, 1993 as required in the SoW. <ul style="list-style-type: none"><li>• Provide letter of intent to appoint a Design Engineer</li><li>• Provide ECSA Professional Registration Certificate and or verifiable proof of valid ECSA Registration number for Designer</li></ul>	Design Integrity, Regulation Compliance
3.4.2.	List Of Completed Construction Projects With Partnership Agreement if Applicable	Minimum 3 Stormwater Infrastructure Projects within the past 5 years. The Contractor submits the following information with each reference project: <ul style="list-style-type: none"><li>• Description</li><li>• Value</li><li>• Date</li><li>• Client Contact details</li></ul>	Capacity to perform the work

### 3.5 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Notes to tenderer:

1. The Tenderer shall submit a written undertaking stating that the proposed key personnel will be available for the project and will not be changed on award of the Contract. Where proposed key personnel are no longer available to undertake the work, the Tenderer shall provide a suitably qualified and experienced replacement with equivalent or higher qualifications and experience (subject to the approval by the Employer).



2. The CV's of Key Personnel should have experience which is comparable in nature to the Works specified in this tender.
3. It is a requirement that the key personnel, in particular, have good communication skills in the English language.
4. Where no information is offered by the Tenderer no points shall be scored.

### 3.6 GENERAL EVALUATION CRITERIA (100%)

<b>Civil And Structural - Qualitative Technical Criteria</b>					
<b>No.</b>	<b>Criteria</b>	<b>Description</b>	<b>Criteria Sub Weighting (%)</b>	<b>Range</b>	<b>Pts</b>
3.6.1	Construction Equipment List	Indicate application i.e. which equipment will be used as per the chosen methodology described in the Method Statements. Furthermore indicate the availability of the equipment. The Contractor provides indication of intent to hire/lease equipment where applicable.	10	Not Provided	0
				List with no methodology application BUT with availability indication OR intent to hire/lease	2
				List with methodology application AND availability indication OR intent to hire/lease	4
				List with methodology AND availability indication AND intent to hire/lease	5
3.6.2	Proposed Civil & Structural Work Plan (Programme)	Provide a Programme listing all civil & structural activities required to technically execute the full scope of work including all major milestones, major elements of design, engineering, procurement, construction, testing, commissioning and/or start-up. The dates generated by the Programme activities represent the anticipated start and completion of work required to execute the full scope of work in a logical and realistic manner.	10	Not Provided	0
				Programme provided BUT non-compliance to the SOW	2
				Programme provided AND compliance to the SOW BUT sequencing needs refinement	4
				Programme presented in a logical manner with full compliance to the SOW	5
3.6.3		Provide a general method statement indicating how the tenderer will perform all	15	Total deficiency AND non-compliance to the SOW	0

	Method Statement For Execution Of The Proposed Civil Works	civil & structural work required to execute the full scope of work as well as all possible interface and/or integration requirements (method statement includes design and construction).  The Method Statement includes all elements of the scope (as well as the contractors plan to conduct construction monitoring in accordance with the Construction regulations.).		Partial deficiency OR non-compliance to the SOW	2
				Partial deficiency AND compliance to the SOW	4
				Complete compliance to the SOW	5
3.6.4	Method Statement For Design Of The Proposed Civil Works	Provide a general method statement indicating how the tenderer will design all civil & structural work required to execute the full scope of work as well as all possible interface and/or integration requirements (method statement includes design and construction).  The Method Statement includes all elements of the design scope (as well as the contractors plan to conduct construction monitoring in accordance with the Construction regulations.). The Contractor includes and motivates any additional investigations and surveys that may be required to execute the full scope of work.	15	Total deficiency AND non-compliance to the SOW	0
				Partial deficiency OR non-compliance to the SOW	2
				Partial deficiency AND compliance to the SOW	4
				Complete compliance to the SOW	5
3.6.5	List Of Completed Design Projects With Partnership Agreement/Letter Of Intent If Applicable	The Contractor must provide a track record of five completed projects as a minimum for design that is equivalent to the works required in this scope of work. Eg) storm water infrastructure of similar nature  The Contractor submits the following	15	Less than 3 completed projects of similar scope of work or list provided is not of similar scope	0
				Three completed projects of similar scope of work or list of projects does not have reference	2

		<p>information with each reference project:</p> <ul style="list-style-type: none"> <li>• Description</li> <li>• Value</li> <li>• Date</li> <li>• Client Contact details</li> </ul> <p>In the case that the tenderer intends to subcontract or form a joint venture, a partnership agreement/letter of intent, together with individual track records of each party involved is to be provided.</p>		<p>Four to five completed projects of similar scope of work with references</p>	4
				<p>More than five complete project references submitted with references</p>	5
3.6.6	List Of Completed Construction Projects With Partnership Agreement/Letter Of Intent If Applicable	<p>The Contractor must provide a track record of five completed projects as a minimum for construction that is equivalent to the works required in this scope of work. Eg) storm water infrastructure of similar nature</p> <p>The Contractor submits the following information with each reference project:</p> <ul style="list-style-type: none"> <li>• Description</li> <li>• Value</li> <li>• Date</li> <li>• Client Contact details</li> </ul> <p>In the case that the tenderer intends to subcontract or form a joint venture, a partnership agreement/letter of intent, together with individual track records of each party involved is to be provided.</p>	15	<p>Less than 3 completed projects of similar scope of work or list provided is not of similar scope</p>	0
				<p>Three completed projects of similar scope of work or list of projects does not have reference</p>	2
				<p>Four to five completed projects of similar scope of work with references</p>	4
				<p>More than five complete project references submitted with references</p>	5
3.6.7	CV Of Proposed Dedicated Professionally Registered Civil Engineer/Technologist To Have A Minimum Of 5 Years' Experience each.	<p>Provide complete project team structure (organograms) based on the full scope of work i.e. site team organogram and design team organogram. The organogram must be accompanied by a letter confirming the availability of project team for the duration of the project It is noted that team members may only be replaced with individuals of equal or higher</p>	15	<p>Experience does not match the role and responsibility of the Professionally Registered Engineers or team</p>	0
	And			<p>CV Of Proposed Dedicated Professionally Registered Civil Engineer/Technologist</p>	2

	CVs of other key project team members	level of competence, after Client approval. The CVs of all civil and structural team members in organogram must be submitted.		To Have A Minimum Of 5 Years' Experience each. <b>And less than 5</b> Of CV's Of Proposed Full Time Project Team	
		<u>Minimum requirements of Design Engineer Professional:</u> CV of key professional ECSA registered personnel (Designer) <u>Minimum Requirements Team</u> <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Site Engineer</li> <li>• Contracts manager</li> <li>• Quality Manager</li> <li>• SHEQ team</li> <li>• Project Planner</li> <li>• Configuration and Document Management Officer</li> <li>• Construction foreman</li> </ul>		CV Of Proposed Dedicated Professionally Registered Civil Engineer/Technologist To Have A Minimum Of 5 Years' Experience each. <b>And 5 or more</b> Of CV's Of Proposed Full Time Project Team	4
		Proof of Qualifications and ECSA Registration of the proposed Professionally Registered Civil Engineer/Technologist is to be submitted with CV's. Proof of Experience of proposed Professionally Registered Civil Engineer/Technologist is to be submitted with CV's. The number of years of relevant experience of the individual must be provided in the CV.		CV Of Proposed Dedicated Professionally Registered Civil Engineer/Technologist To Have A Minimum Of 5 Years' Experience each. <b>And all</b> Of CV's Of Proposed Full Time Project Team	5

3.6. 8	Technical Deviations and Qualification.	<p>The Tenderer shall confirm if there are any technical deviations and/or qualification to the technical specification/information and/or scope of works/services by means of a signed letter and completed deviation schedule form.</p> <p>Where there are deviations and/or qualification, the tenderer shall list the deviation or qualification also indicating the rationale and benefits thereof (in terms of cost, time and/or quality) to the Employer.</p> <p>1) Submit signed letter confirming that there are no technical deviations and/or qualifications.</p> <p>OR</p> <p>2) Where there are deviations and/or qualifications, complete deviation schedule to capture the deviation and qualification indicating the benefits thereof to the Employer in terms of cost, time and/or quality.</p> <p>Caveat: The submission of alternatives (if any) is subject to the Tenderer submitting the main option.</p>	5	Total deficiency AND non-compliance to the SOW	0
				Partial deficiency OR non-compliance to the SOW	2
				Partial deficiency AND compliance to the SOW	4
				Complete compliance to the SOW or List Deviations with rationale and Pricing	5

#### **4. TET MEMBER RESPONSIBILITIES**

**Table 5: TET Member Responsibilities**

<b>Mandatory Criteria Number</b>	<b>TET 1</b>	<b>TET 2</b>	<b>TET 3</b>
3.4.1	X	X	X
3.4.2	X	X	X
<b>Qualitative Criteria Number</b>	<b>TET 1</b>	<b>TET 2</b>	<b>TET 3</b>
3.6	X	X	X

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#### **4.1 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS**

##### **4.1.1 Risks**

**Table 6: Acceptable Technical Risks**

<b>Risk</b>	<b>Description</b>
1.	Provide Testimonials or Completion Certificates for at least 3 similar completed projects within the last 10 years

**Table 7: Unacceptable Technical Risks**

<b>Risk</b>	<b>Description</b>
1.	Exclusion of CV's of key construction personnel
2.	Exclusion of a project specific schedule
3.	Provide Testimonials or Completion Certificates for at least 3 un-similar (civil works) completed projects within the last 15 years
4.	Unclear/incomplete organogram of key personnel

##### **4.1.2 Exceptions / Conditions**

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

<b>Risk</b>	<b>Description</b>
1.	Acceptable deviation with technical qualification



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

<b>Risk</b>	<b>Description</b>
1.	Completion of the works in greater than 12 months
2.	Exclusions of scope specified in the employers requirements

## **5. AUTHORISATION**

This document has been seen and accepted by:

<b>Name &amp; Surname</b>	<b>Designation</b>
	Project Engineering Manager
	Medupi Civil LDE
	Medupi Civil Engineer

## **6. REVISIONS**

<b>Date</b>	<b>Rev.</b>	<b>Compiler</b>	<b>Remarks</b>
June 2021	0		-
Sept 2022	2		Change in TET members and percentages

## **7. DEVELOPMENT TEAM**

## **8. ACKNOWLEDGEMENT**

N/A

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