

	Strategy	Group Capital Division
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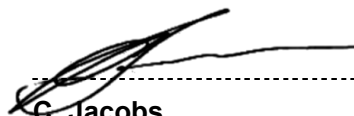
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1. Introduction

An invite will be issued for interested service providers to participate in the tender for the provision of Occupational Health and Safety services. This document sets out the method and criteria that will be used to evaluate the tenders that will be submitted from this pre-qualification invite.

2. Supporting Clauses

2.1 Scope

This strategy defines the technical evaluation team (TET) and their responsibilities regarding evaluation for the Occupational Health and safety services scope. The mandatory and functional evaluation criterion used to evaluate the submitted tenders is also included in this strategy.

2.1.1 Purpose

The purpose of this tender technical evaluation strategy is to define the mandatory evaluation criteria, functional evaluation criteria and TET member's 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 will apply to the technical evaluation team appointed for the provision of Occupational Health and safety Services scope of works.

2.1.3 Effective date

From the date of authorisation

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] ISO 9001 Quality Management Systems
- [2] 240-48929482 Tender Technical Evaluation Procedure
- [3] 32-1034 Eskom procurement policy
- [4] 474-59 Internal audit procedure
- [5] 559-38713727 Health and safety service provider scope of work
- [6] 32-726 Contract and Contractor OHS Management
- [7] ISO 45001:2018 OHS Management System

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2.2.2 Informative

Not applicable

2.3 Definitions

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.

Tender: A tender refers to an open or closed competitive request for quotations / prices against a clearly defined scope / specification.

COR 14.3 Certificate: Certificate of incorporation

COR 14.1 Certificate: Notice of Incorporation

MOI: Memorandum of Incorporation

COR 9.4: Name reservation proof

Structured Capability Readiness Level Framework: Is a strategic and operational model that enables organisations to systematically assess, develop, and deploy human resources based on capability requirements.

2.3.1 Classification

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

2.4 Abbreviations

Abbreviation	Explanation
CIPC	Companies and Intellectual Property Commission
Etc	Et cetera
Min	minimum
S&H	Safety and Health
TET	Technical evaluation team

2.5 Roles and Responsibilities

The roles and responsibilities are as per the Tender Technical Evaluation Procedure (240-48929482).

2.6 Process for Monitoring

This strategy shall be monitored by the Internal Audit Procedure.

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2.7 Tender technical evaluation strategy

2.7.1 Tender technical evaluation threshold

The technical evaluation consists of two phases. Phase one is the Mandatory criteria evaluation, phase two is the Functional criteria evaluation.

To be eligible for functional evaluation, the tenderer shall meet all the mandatory requirements. Once it has been determined that the tenderer has met all the mandatory criteria, the tenderer's returnable shall be subjected to the functional evaluation criteria.

2.7.2 Weighted score card

A weighted score card approach will be used to evaluate the tenders against the Employer's requirements. The individual scores from the TET members on each evaluation criteria will be added and averaged to obtain a final score. The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 70%.

2.7.3 Tender technical evaluation team

Shall consist of:

	Name	Department	Designation
1	Andile Ngidi	Health and Safety	Middle Manager SHERQ
2	Pravan Sookdeo	CMO	Chief Advisor Contracts Management
3	Aaron Mahadeo	PDD	Contract Manager
4	Sheryl Isaacs	Health and Safety	Middle Manager SHERQ
5	Dankies Mapote	Health and Safety	Snr Adv Occupational Health and safety
6	Kgaugelo Sedibeng	Health and Safety	Chief Advisor Risk Management
7	Onela Toboti	Health and Safety	Senior Advisor Occupational Hygiene

2.8 Technical evaluation process

The following section indicates how the factors in the technical evaluation will be assessed to complete a standard evaluation for all the suppliers

2.8.1 Guidance Notes:

The following guidelines are to be observed when putting together the bid documents .

- The response to the mandatory and functional criteria are to be separated and clearly marked.
- The bid documentation contents are to be indexed as per criteria numbering.
- Each entry in the contents page must include a hyperlink to its respective section.
- All images used must be readable and in context.
- When reference is made to cost of a project, indicate the total cost of project and the cost of your respective portion of said project.
- Where explanations are required, the explanations must be concise
- All references quoted must be relevant to the scope.

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- h) When referring to past projects, prior to going into detail, include a table that mentions the project, date completed, cost and scope.
- i) When providing years of experience for dedicated staff, A summary table is to be included to indicate, name, position, years of experience and as total average years of experience.
- j) If there is not information provided for a given criteria, then the score will be 0 for that particular criteria.
- k) In the table stated in (i) above also include professional affiliation with the relevant professional bodies.

2.8.2 Mandatory evaluation criteria (See appendix A.2)

In order for the bidder to advance to the functional evaluation phase, the bidder must obtain 100% for mandatory criteria.

2.8.3 Functional evaluation criteria (see appendix A.3)

The bidders will be assessed as per criteria in Appendix B. Only bidders who have scored over all 70% and above will be considered technically compliant and proceed to the next evaluation stage as per procurement processes.

The final score will be determined by using the following formula:

$$Results = \frac{Evaluation\ Score}{5} \times Score\ \% \times Weight\ \%$$

Sample calculation of scores:

$$Results = \frac{Evaluation\ Score}{5} \times Score\ \% \times Weight\ \%$$

$$= (5/5) \times 20\% \times 40\%$$

$$= 0.08 \times 100$$

$$= 8 \text{ (as per figure 1, sub-criteria 1.1)}$$

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Evaluation criteria		Weight %	Sub Criteria	Score %		Score	
						A	
	STAGE 1: FUNCTIONALITY				Evidence	Score 1-5	Result %
1	Company experience and previous work on providing Safety & Health services, evaluating and providing solutions in planning, developing and executing of S&H services. for future success	40%	1.1 Company experience in planning, development and execution of S&H services in large capital projects.	20%	Contact details & Project details for verification	5	8
			1.2 Demonstrate how you have managed the support to a regulated organisation and have successfully implemented the required services.	30%	Evidence of summarised Scope of Work implemented as per 1.1	5	12
			1.3 Number of relevant references with a description of scope of work performed (evaluating and providing solutions)	30%	Evidence of recommended changes and implementation of solutions	5	12
			1.4 Demonstrate capability and capacity by showing a track record in the abovementioned services for 4 years or more aligned to the technologies specified in the SoW.	20%	KPI's and/or improvement metrics that ensured successful execution of scope of work.	5	8

Figure 1: Sample evaluation scoring

From Figure 1 (above) it can be seen that if a tenderer scores 5 for each sub-criteria, the bidder will obtain the maximum percentage of 40% out of the total 100%.

The final score will be obtained by adding up the individual TET members scoring and dividing it by the number of TET members.

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3. Authorization

This document has been seen and accepted by:

Name	Designation
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Sheryl Isaacs	Middle Manager SHERQ
Dankies Mapote	Senior Advisor Occupational Health and safety
Onela Toboti	Senior Advisor Occupational Hygiene
Pravan Sookdeo	Chief Advisor Contracts Management

4. Revisions

Date	Rev.	Remarks
August 2025	0	Document creation

5. Development Team

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

- Aaron Mahadeo
- Abigail Booth
- Sheryl Isaacs

6. Acknowledgements

N/A

Appendix A – Guidance Notes and Mandatory Criteria.

A.1 Guidance notes:

As per attached spreadsheet Appendix A_Technical evaluation scorecard Health and Safety services provider V2 tab A1

A.2 Mandatory Criteria:

As per attached spreadsheet Appendix A_Technical evaluation scorecard Health and Safety services provider V2 tab A2

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Appendix A3 – Functional criteria

As per spreadsheet Appendix A_Technical evaluation scorecard Health and Safety services provider
V2 tab A3

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