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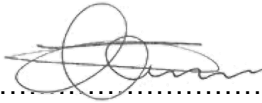
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## **1. INTRODUCTION**

Matimba Power Station uses a series of conveyers to transport mixed ash from the power station to the ash dump where its disposed. These belts make use of electric motor and gearbox drive trains which are joined through couplings. The current low speed coupling between the gearbox and drive pulley makes use of lolling mechanism that requires 24 to tighten and loosen, this makes up lost time of 48 hours before any work is done. This project serves to add a solid flange coupling on the low speed coupling configuration to eliminate the waiting time of the locking mechanism.

## **2. SUPPORTING CLAUSES**

### **2.1 SCOPE**

The purpose of this project is to:

- Decommission current configuration
- Manufacture and supply selected shafts and couplings
- Design new torque arms
- Install new solid flange configuration
- Install new torque arm
- Commission after installation completion

Part of this scope is to ensure that the technical evaluations are conducted as reasonably as practicable to comply with the current tender evaluation procedure.

#### **2.1.1 Purpose**

The purpose of this document is to define the tender returnables, mandatory and qualitative evaluation criteria. The Purpose is also to appoint the Technical Evaluation Team (TET) members.

#### **2.1.2 Applicability**

This document applies to Matimba 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] Works Information

### **2.2.2 Informative**

## **2.3 DEFINITIONS**

None

### **2.3.1 Disclosure Classification**

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

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## 2.4 ABBREVIATIONS

Abbreviation	Description
ECSA	Engineering Council of South Africa
EDWL	Engineering Design Work Lead
N/A	Not Applicable
TET	Technical Evaluation Team

## 2.5 ROLES AND RESPONSIBILITIES

Roles and responsibilities shall be as per “240-48929482: Tender Technical Evaluation Procedure”, summarised below:

**Engineering Manager:** The Engineering Manager shall ensure that all staff, in their respective areas understand and adhere to this procedure.

**Engineering Design Work Lead (EDWL):** The EDWL is responsible to manage the execution and adherence to this procedure. The EDWL compiles the Technical evaluation reports with input from respective TET members.

**Technical Evaluation Team (TET) member:** The delegated engineers / technical specialists who are responsible to review and evaluate technical aspects of the tender documentation as per the Tender Technical Evaluation Strategy. Furthermore, the TET compiles a report detailing the findings of the evaluation for the respective tenders on the allocated area of responsibility as highlighted in Table 5; this is mandatory responsibility for each TET member. The report should also highlight major areas of compliance and non-compliance, risks, points to be considered for negotiations etc. in accordance with the “240-48929482: Tender Technical Evaluation Procedure”. Where possible, one consolidated report will be acceptable per functional area, however the report should be supported by the respective TET member score sheets.

## 2.6 PROCESS FOR MONITORING

N/A

## 2.7 RELATED/SUPPORTING DOCUMENTS

N/A

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### 3. TENDER TECHNICAL EVALUATION STRATEGY

#### 3.1 TET MEMBERS

The following Evaluation Team Members have been appointed to perform evaluations.

**Table 1: TET Members**

TET number	TET Member Name	Designation
1	Shandukani Manena	Ash Handling Plant System Engineer
2	Jonas Boroto	Senior Supervisor Technician Maintenance

#### 3.2 TENDER RETURNABLES

The following lists the tender returnables to be supplied by the contractors during tender. Tender returnables shall be used to perform mandatory and qualitative technical evaluations. Column 3 of Table 2 below references the applicable section in the works information document, defining the scope of work and technical requirements which will be issued on the open market during tender.

**Table 2: Tender returnables for technical evaluations**

Tender returnables: It is recommended that the contractor uses a file index divider system when submitting the tender. Each of the following returnables should be in its own section with divider. This will assist in finding information. The file index dividers must correspond to the tender returnables. If the following tender returnables are not submitted, the tender cannot be evaluated and deemed unresponsive.			
Item	Returnables	Change Hollow Shaft Configuration Works Information Section:	Expectations
1	Gatekeeper /Mandatory	N/A	Provide proof of ECSA Professional Engineer (PREng) registration of (civil/mechanical) engineer who will be responsible for torque arm design and drawings
2	Gatekeeper /Mandatory	N/A	Proof of access to/ownership of workshop to manufacturing and machining facility of pulley shafts
3	Deviation Table	N/A	Complete the supply and scope of work deviation table as included in the specification and specify if there are any deviations. If there are none. A clear statement must be supplied.
4	Company profile and proven experience in conveyor belt drive installation	N/A	Attach the following as proof: 1. Company Profile with Company record proving technical expert works undertaken and organogram depicting company resources and following: 2. Contract number with SOW with defects clearance certificate for completed projects OR 3. Purchase order number with SOW with defects clearance certificate for completed projects OR 4. Completion certificate with SOW with defects clearance certificate for completed project.
5	Project/site manager	N/A	Submit CV to meet the following requirements and should include experience in the following areas:

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			1. Minimum trade certificate or National Diploma in Engineering with proof of qualification - submit qualifications 2. Managerial experience 3. Relevant experience in working with couplings/conveyor drives  Provide contactable references in the CV
6	Site supervisor	N/A	Submit CV to meet the following requirements and should include experience in the following areas: 1. Minimum Trade Certificate (Fitter qualification - submit qualifications) 2. Supervisor experience Relevant experience in working with couplings/conveyor drives  Provide contactable references in the CV
7	Method statement for installing solid flange low speed coupling	N/A	Provide method statement for installing solid flange low speed coupling
8	QCP for installing solid flange low speed coupling	N/A	Provide QCP for installing solid flange low speed coupling
9	Method statement for commissioning conveyor belt	N/A	Provide method statement for commissioning conveyor belt

### 3.3 DEVIATION TABLE

The contractor shall complete the following deviation table. The contractor shall list any deviations to the Matimba Power Station Change hollow shaft Configuration section 3. This shall be used to determine if there are acceptable or unacceptable risks based on the tendered proposal.

Matimba Power Station Change Hollow Shaft Configuration section 3. information section:	Are there any deviations? Y/N	If yes, list the deviations - These will be considered as per Score Criteria item 1
Section 3.1.2		
Section 3.2		

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### **3.4 MANDATORY TECHNICAL EVALUATION CRITERIA**

In accordance with 240-48929482, an assessment of 'NO' against item 1 in Table 3 shall disqualify the assessed tendered design from further Qualitative Evaluation.

**Table 3: Mandatory Technical Evaluation Criteria**

<b>Item</b>	<b>Mandatory Technical Criteria Description</b>	<b>Reference to Technical Specification / Tender Returnable</b>	<b>Motivation for use of Criteria</b>
1	Provide proof of ECSA Professional Engineer (PREng) registration of (civil/mechanical) engineer who will be responsible for torque arm design and drawings	Section 3.2 - Table 2 - Item 1	Eskom requires that any persons responsible for engineering designs should be a registered professional engineer with ECSA. It is mandatory that also the responsible persons for the designs from the third party is also a registered
2	Proof of access to/ownership of workshop to manufacturing and machining facility of pulley shafts. The workshop must have lathe machines and other tools machine pulley shafts. There will be mandatory workshop visit	Section 3.2 - Table 2 - Item 2	Large part of this project is to manufacture pulley shafts that will allow for the new solid flange arrangement. It is mandatory that a contractor should have the capacity to manufacture these pulley shafts.

### 3.5 QUALITATIVE TECHNICAL EVALUATION SCORING AND THRESHOLD

Table 4 below shows the scoring method for the Qualitative Technical Evaluation Criteria as prescribed in 240-48929482.

The criteria are listed in Table 5, where items shall be given a point of 0, 2, 4 or 5. Using the weighting for each item as defined, the final total score will be added up and expressed as a percentage.

**Table 4: Scoring Method for Qualitative Technical Evaluation Criteria**

Score	%	Definition
5	100	<b>COMPLIANT</b> Meet technical requirement(s) AND No foreseen technical risk(s) in meeting technical requirement(s).
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> Does not meet technical requirement(s) with: <ul style="list-style-type: none"> <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>		

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### 3.6 QUALITATIVE TECHNICAL EVALUATION CRITERIA

In accordance with 240-48929482, each contractor which has met all the Mandatory Evaluation Criteria as defined in Section 3.4 will be evaluated against the Qualitative Evaluation Criteria defined in Table 5 below. The scoring of qualitative criteria shall be based on the degree of achievement by the tenderer to meet the technical requirements. Each item of Table 5 shall have the specific sub-weighting criteria defined.

The minimum weighted final score (threshold) required for each tendered proposal to be considered FUNCTIONALLY ACCEPTABLE from a technical perspective is 70%. The Eskom objective of lowest life cycle costs is achieved by high quality proposals that have obtained higher than 70% in the past related tenders.

**Table 5: Qualitative technical evaluation criteria**

	<b>Qualitative Technical Criteria Description</b>	<b>Tender Returnable(s)</b>	<b>Sub Weighting (%)</b>	<b>Scoring Criteria</b>
<b>3.6.1</b>	Company profile and proven experience in conveyor belt drive installation Attach the following as proof: 1. Company Profile with Company record proving technical expert works undertaken and organogram depicting company resources and following: 2. Contract number with SOW with defects clearance certificate for completed projects OR 3. Purchase order number with SOW with defects clearance certificate for completed projects OR 4. Completion certificate with SOW with defects clearance certificate for completed project.	Section 3.2 - Table 2 – Item 4	60%	<b>COMPLIANT: Score = 5 (100%).</b> • 5 years or more proven experience
				<b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS: Score = 4 (80%).</b> • 4 years proven experience
				<b>NON-COMPLIANT: Score = 2 (40%).</b> • Less than 3 years proven experience
				<b>TOTALLY DEFICIENT OR NON-RESPONSIVE: Score = 0 (0%).</b>
<b>3.6.2</b>	Project/site manager	Section 3.2 – Table 2 - Item 5	10%	<b>COMPLIANT: Score = 5 (100%).</b>

	Qualitative Technical Criteria Description	Tender Returnable(s)	Sub Weighting (%)	Scoring Criteria
	Submit CV to meet the following requirements and should include experience in the following areas: 1. Minimum trade certificate or National Diploma in Engineering with proof of qualification - submit qualifications 2. Managerial experience 3. Relevant experience in working with couplings/conveyor drives  Provide contactable references in the CV			<ul style="list-style-type: none"> <li>5 years or more proven experience with required minimum qualifications</li> </ul> <b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS: Score = 4 (80%).</b> <ul style="list-style-type: none"> <li>3-4 years proven experience with required minimum qualifications</li> </ul> <b>NON-COMPLIANT: Score = 2 (40%).</b> <ul style="list-style-type: none"> <li>1-2 years proven experience with required minimum qualifications</li> </ul> <b>TOTALLY DEFICIENT OR NON-RESPONSIVE: Score = 0 (0%).</b> <ul style="list-style-type: none"> <li>No experience/minimum qualification/response</li> </ul>
3.6.3	Site supervisor  Submit CV to meet the following requirements and should include experience in the following areas: 1. Minimum Trade Certificate (Fitter qualification - submit qualifications) 2. Supervisor experience Relevant experience in working with couplings/conveyor drives  Provide contactable references in the CV	Section 3.2 – Table 2 - Item 6	10%	<b>COMPLIANT: Score = 5 (100%).</b> <ul style="list-style-type: none"> <li>5 years or more proven experience with required minimum qualifications</li> </ul> <b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS: Score = 4 (80%).</b> <ul style="list-style-type: none"> <li>3-4 years proven experience with required minimum qualifications</li> </ul> <b>NON-COMPLIANT: Score = 2 (40%).</b> <ul style="list-style-type: none"> <li>1-2 years proven experience with required minimum qualifications</li> </ul> <b>TOTALLY DEFICIENT OR NON-RESPONSIVE: Score = 0 (0%).</b>

	Qualitative Technical Criteria Description	Tender Returnable(s)	Sub Weighting (%)	Scoring Criteria
				<ul style="list-style-type: none"> <li>No experience/minimum qualification/response</li> </ul>
3.6.4	Method statement and QCP for installing solid flange low speed coupling	Section 3.2 – Table 2 - Item 7 to 8	10%	<b>COMPLIANT: Score = 5 (100%).</b> <ul style="list-style-type: none"> <li>Submitted and technically adequate with all the necessary steps and sequence. The method statement and QCP are aligning</li> </ul>
				<b>NON-COMPLIANT: Score = 2 (40%).</b> <ul style="list-style-type: none"> <li>Submitted but not technically detailed/aligning</li> </ul>
				<b>TOTALLY DEFICIENT OR NON-RESPONSIVE: Score = 0 (0%).</b> <ul style="list-style-type: none"> <li>Not submitted</li> </ul>
3.6.5	Method statement for commissioning conveyor belt	Section 3.2 – Table 2 - Item 9	10%	<b>COMPLIANT: Score = 5 (100%).</b> <ul style="list-style-type: none"> <li>Submitted and technically adequate with all the necessary steps and sequence</li> </ul>
				<b>NON-COMPLIANT: Score = 2 (40%).</b> <ul style="list-style-type: none"> <li>Submitted but not technically detailed</li> </ul>
				<b>TOTALLY DEFICIENT OR NON-RESPONSIVE: Score = 0 (0%).</b> <ul style="list-style-type: none"> <li>Not submitted</li> </ul>

	Qualitative Technical Criteria Description	Tender Returnable(s)	Sub Weighting (%)	Scoring Criteria
			<b>TOTAL: 100</b>	

### 3.7 TET MEMBER RESPONSIBILITIES

**Table 6: TET Responsibilities**

Mandatory Criteria Number	TET 1	TET 2
1	X	
2	X	
Qualitative Criteria Number	TET 1	TET 2
3.6.1.	X	X
3.6.2	X	X
3.6.3	X	X
3.6.4	X	X
3.6.5	X	X

### 3.8 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

#### 3.8.1 Risks

**Table 7: Acceptable Technical Risks**

Risk	Description
1.	Value Engineering proposals highlighting the benefits of the proposal to the project in terms of cost, time and/or quality. The submission of alternatives is subject to the <i>Tenderer</i> submitting the main options. The changes align to <i>Client</i> objectives.
2.	Non-substantive changes that add value in terms of cost, time and/or quality.
3.	Technical deviations add value and improve end-product quality. Risk mitigations are reasonable.

**Table 8: Unacceptable technical risks**

Risk	Description
1.	Contractor does not supply/supplies incorrect couplings
2.	Contractor does not provide all requested method statements/supplies incorrect method statements
3.	Contractor does not own a workshop/manufacturing facility and has not declared how much of the manufacturing will be outsourced or who their supplier is

#### 3.8.2 Exceptions / Conditions

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


Risk	Description
1.	There are minor inconsistencies between timing, project deliverables and the proposed methodologies, which are deemed not to result in project delays once addressed.
2.	Deviations with technical qualifications that align to <i>Client</i> objectives. Rational for deviations add value.

**Table 10: Unacceptable Technical Exceptions / Conditions**

<b>Risk</b>	<b>Description</b>
1.	Contractor does not supply/supplies incorrect couplings
2.	Contractor does not provide all requested method statements/supplies incorrect method statements
3.	Contractor does not own a workshop/manufacturing facility and has not declared how much of the manufacturing will be outsourced or who their supplier is

#### **4. AUTHORISATION**

This document has been seen and accepted by:

<b>Name</b>	<b>Designation</b>	<b>Signature</b>
Shandukani Manena	Engineer Prof Engineering	
Jonas Boroto	Senior Supervisor Technician Maintenance	

#### **5. REVISIONS**

<b>Date</b>	<b>Rev.</b>	<b>Compiler</b>	<b>Remarks</b>
21 May 2025	0	Shandukani Manena	First draft Issued for Review by Stakeholders
11 September 2025	1	Shandukani Manena	Engineering manager made comments and requested for changes to be implemented

#### **6. DEVELOPMENT TEAM**

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

- Shandukani Manena

#### **7. ACKNOWLEDGEMENTS**

N/A.

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