

 Eskom	Strategy	Generation
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Title:
 **Lethabo Power Station General Bearings, Seals, Plumber Blocks & Bearing Sleeves - Tender Technical Evaluation Strategy**

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## **1. INTRODUCTION**

To ensure that rotating equipment operates safely and reliably, it is the intent to establish a multi-year contract for the supply and delivery of general, non-specialised bearing, seals, plumber blocks and bearing sleeves for the purposes of replenishing stock and ensuring that spares are available when it is required.

## **2. SUPPORTING CLAUSES**

### **2.1 SCOPE**

This document provides the tender technical evaluation strategy for the supply and delivery of general, non-specialised bearing, seals, plumber blocks and bearing sleeves for the purpose of stock replenishment at Lethabo Power Station.

#### **2.1.1 Purpose**

This document outlines the criteria that will be used to evaluate the tenderers that will result from the Request for Quotation. This strategy defines the Mandatory Evaluation Criteria and Qualitative Evaluation Criteria. The technical evaluation strategy serves as basis for the tender technical evaluation process.

#### **2.1.2 Applicability**

This document applies to the Lethabo Power Station only.

### **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] ISO 9001 Quality Management Systems
- [3] 32-1034 Eskom Procurement Policy
- [4] 32-727 – Eskom Safety, Health, Environment and Quality (SHEQ) Policy
- [5] National Environmental Management Waste, Act 59 of 2008
- [6] Occupational Health and Safety Act (Act 85 of 1993)

#### **2.2.2 Informative**

None

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## 2.3 DEFINITIONS

**Table 1: Definition of Terms**

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
Schedule A/B	Schedule A/B refers to Appendix A, containing the technical specification for the various components in the contract. Schedule A is populated by the Employer stating the desired technical specifications, while Schedule B shall be completed by the tenderer, strictly by hand, stating the specifications of the components offered by the tenderer
Technical Specification	The document/s forming part of the contract in which the technical requirements for the goods to be supplied, are set out
The Client	The end user will be Eskom who will be represented by Lethabo 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

**Table 2: List of abbreviations**

Abbreviation	Description
TTES	Tender Technical Evaluation Strategy
TET	Technical Evaluation Team

## 2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

## 2.6 PROCESS FOR MONITORING

N/A

## 2.7 RELATED/SUPPORTING DOCUMENTS

Not Applicable

## 3. TENDER TECHNICAL EVALUATION STRATEGY

### 3.1 TECHNICAL EVALUATION METHOD

A three stage Technical Evaluation Strategy is set out, consisting of the evaluation of a mandatory gatekeeper, followed by a desktop qualitative evaluation of the tenders that passed the mandatory gatekeeper's requirements. Lastly, the tenderers that passed the mandatory and the desktop qualitative

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evaluation, will be subject to a site visit from the technical evaluation team, which will also be scored in a qualitative manner.

#### Stage 1:

All TET members as defined in the Tender Technical Evaluation Strategy (and specifically TET member responsibilities) shall independently evaluate each tender in terms of compliance to the defined Mandatory Evaluation Criteria. Each TET member shall provide an individual scoring form on the compliance / non-compliance of all tenderers' responses to the Mandatory Evaluation Criteria. Each TET member shall provide clear justification(s) for each Mandatory Criteria evaluated as non-compliant ('NO'). All individual scoring forms shall be evaluated by the lead evaluator to check for consistency in scoring of the Mandatory Evaluation Criteria. Should the lead evaluator find any inconsistencies in the scoring, an internal clarification meeting shall be conducted with all TET members (who performed the evaluation) in the presence of the Commercial Representative. This meeting shall aim to jointly establish which of the tenderers qualify for the next phase of Qualitative Technical Evaluation. In the case where no tenderer meets all Mandatory Evaluation Criteria this shall be formally escalated to the Commercial Representative who shall guide the subsequent process. All meeting minutes shall be recorded and distributed to the Commercial Representative and included in the Tender Technical Evaluation Report.

#### Stage 2:

The scoring of desktop qualitative criteria shall be based on the degree of achievement by the tenderer to meet the technical requirements. A score shall be allocated as per section 3.5. Each TET member shall populate a Tender Technical Evaluation Scoring Form for each tenderer. Note: Individual Qualitative Criteria scores shall only be finalised after all clarification sessions have been concluded and the lead evaluator is confident that discrepancies within the discipline's scoring has been dealt with sufficiently.

A weighted score card approach will be used to evaluate the tenders against the Employer's requirements. The following scoring method will be used in general. It will be specified where other scoring methods is used.

**Table 3: Technical Evaluation Scoring Method**

SCORE	PERCENTAGE	DESCRIPTION
5	100	<b>COMPLIANT</b> <ul style="list-style-type: none"><li>• Meet(s) technical requirement(s)/AND;</li><li>• No foreseen technical risk(s) in meeting technical requirements.</li></ul>

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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;</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>

### Stage 3:

The scoring of site visit qualitative criteria shall be based on the degree of achievement by the tenderer to meet the technical requirements. A score shall be allocated as per section 3.6. Each TET member shall populate a Tender Technical Evaluation Scoring Form for each tenderer. Note: Individual Qualitative Criteria scores shall only be finalised after all clarification sessions have been concluded and the lead evaluator is confident that discrepancies within the discipline's scoring has been dealt with sufficiently.

A weighted score card approach will be used to evaluate the tenders against the Employer's requirements in a manner like Stage 2 explained above.

### 3.2 TECHNICAL EVALUATION THRESHOLD

For the mandatory technical evaluation portion (as stipulated in 3.4), a gatekeeper/YES/NO approach will be taken to assess compliance, and any scores of "No" against the submission will result in disqualification.

For sections 3.5 and 3.6, which is the desktop and site visit qualitative evaluation portions, a minimum threshold of 70% will apply for each section.

### 3.3 TET MEMBERS

TET members will be appointed in writing by the accountable manager/Engineering Manager.

**Table 4: Core TET Members**

<b>TET number</b>	<b>TET Member Name</b>	<b>Designation</b>
TET 1		Lead Evaluator, Design and Specification
TET 2		Boiler Plant Engineering

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TET 3		Boiler Plant Engineering
TET 4		Electrical Engineering
TET 5		Electrical Engineering
TET 6		Outside Plant Engineering
TET 7		Outside Plant Engineering
TET 8		Turbine Plant Engineering
TET 9		Turbine Plant Engineering

Note: In the event of the unavailability of a TET member, any other member of the section may be allowed to stand in as evaluation member, after being appointed in writing by the accountable engineering managers. A **minimum** of two members of each abovementioned sections must evaluate.

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### 3.4 MANDATORY TECHNICAL EVALUATION CRITERIA

Gatekeepers identified in the tender document will be “must meet” criteria identified in tabular questionnaire form. The tenderer’s submission will be assessed based upon questionnaire seeking **YES** or **NO** response from the tenderers with no point scores or weighted averaged assigned to the response.

Response of **NO** against any criteria will be elimination of the tenderer’s submission for further consideration or short listing for detailed technical evaluation. Gatekeepers will be minimum criterion elements with most significant and critical parameters applicable to the successful execution of the RFQ.

**Table 5: 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>
1.1	Demonstration of a QMS (Quality Management System)	<p>Service Provider must submit either the latest ISO 9001 certification or proof of QMS. The proof of QMS document is required to have the following system document in place:</p> <p>i. Specification verification systems</p> <ul style="list-style-type: none"><li>• to demonstrate the Service Provider’s commitment to quality assurance and continuous improvement.</li><li>• Ensure traceability of components and conformity to required specifications</li><li>• Promote accountability and process control</li></ul>	<p>To ensure that all services and deliverables meet the required quality standards, it is critical that the Service Provider operates under a formally established Quality Management System (QMS). The requirement for either ISO 9001 certification or documented proof of a QMS—specifically including material verification systems—is intended to:</p> <ul style="list-style-type: none"><li>• <b>Demonstrate the Service Provider’s commitment to quality assurance and continuous improvement.</b></li><li>• <b>Ensure traceability and conformity of materials</b> to required specifications, reducing the risk of defects, non-compliance, and counterfeit spares.</li><li>• <b>Promote accountability and process control.</b></li></ul>



	Mandatory Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1.2	Fully completed Schedule A/B for the Bearings tendered for	All items/bearings tendered for must be fully completed under schedule B. Supplier will be deemed noncompliant if any of the items tendered for is not completed (NB! Supplier must complete schedule B with the actual specification of the items to be supplied and not a copy and paste from Schedule A – the brand, model and series where applicable shall be provided, failure to do so will be deemed as noncompliant) Note that the submitted product specifications, brands, models and series will form part of the contractual agreement thus will need to be adhered to throughout the contract period/duration	<p><b>Ensure clarity and technical accuracy</b> of the products being offered, enabling the evaluation team to assess compliance with performance and quality requirements.</p> <p><b>Prevent generic or copy-paste responses</b> that do not reflect the supplier's true offering, which could result in misrepresentation or delivery of non-conforming items.</p>

### 3.5 QUALITATIVE TECHNICAL EVALUATION CRITERIA FOR DESKTOP EVALUATION

Tenderers who passed the mandatory gatekeepers will be subjected to a qualitative technical evaluation. This portion of the evaluation will be assessed based on the tenderer's tender submission package. For the qualitative technical evaluation, a minimum score of 70% must be obtained in order to gain further consideration for this transaction.

**Table 6: Qualitative Technical Evaluation Criteria for Desktop Evaluation**

ITEM	TECHNICAL EVALUATION CRITERIA	Criteria Weighting	Evaluation Scoring Breakdown				Percentage score:  Criteria Weighting x evaluation score breakdown %
			0 0%	2 40%	4 80%	5 100%	
1.	<b>At least 5 completed orders related to the scope of work in the past 5 years.</b> NOTE: <ul style="list-style-type: none"> <li>Orders completed more than 5 years ago will not be accepted as valid references (that is, 5 years from date of tender closing)</li> <li>Must be from related industries (power generation, petrochemical, paper, mining, etc.)</li> </ul>	25	Zero (0) completed orders	1-2 completed orders	3-4 completed orders	≥ 5 completed orders	
2.	<b>Proof of supply agreement from the manufacturer(s), which include warranty terms offered on the OEM's components</b> NOTE: The followings are requirements for this returnable: <ol style="list-style-type: none"> <li>Must be printed on the official OEM letterhead and it must be signed and dated by the OEM representative</li> </ol>	25	No or zero supply agreement	Verifiable agreements are in place but not signed, no warranty mentioned.	Verifiable agreement(s) in place, all required letterheads, dates and signature are present on the letter but no	Supply agreements are in place, verifiable, signed and dated and on official letterheads and warranty	

	2. Must have the contact details of the OEM Representative 3. Must include typical warranty terms offered by the OEM				warranty mentioned	terms are clearly stated	
<b>3.</b>	Datasheets for items tendered on	<b>25</b>	Non-responsive/ Datasheets provided for 20% or less of the components tendered on	Datasheets provided for 21%-50% less of the components tendered on	Datasheets provided for 51%-99% of the components tendered on	Datasheets provided for 100% of the components tendered on	
<b>5</b>	<b>Supply requirements for Bearings</b>  1. Submit a signed letter by the managing director and/or the owner of the company (legal representative of the company) stating that <u>counterfeit/unbranded/uncertified</u> bearings will <b>not</b> be supplied to Lethabo Power Station.  2. Submit a signed letter by the managing director and/or the owner of the company (legal representative of the company) stating/listing all the committed bearing brands/OEMs (e.g. SKF, BMG, FAG, etc., but not limited to) to be supplied for all the bearings tendered for. The committed brands will form part of the contractual agreement and thus shall be always adhered to throughout the contract term/period. The declaration must be in an official letter format clearly identifying the supplier's name and logo	<b>25</b>	Did not submit the required declaration letters or submitted the letters but they do not meet all requirements stipulated	N/A	N/A	Met all the requirements.	

	as well as the designation/s and contact details of the signatories.						
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### 3.6 QUALITATIVE TECHNICAL EVALUATION CRITERIA FOR SITE EVALUATION

Tenderers who have passed the mandatory evaluation and obtained a score of more than 70% for section 3.5 (Qualitative technical evaluation for desktop evaluation), will be subject to a site visit from evaluation team members, which will be scored qualitatively as set out in the table below. A minimum threshold of 70% will apply to this section, in order to be deemed as technically compliant

**Table 7: Qualitative Technical Evaluation Criteria for Site Visit Evaluation**

ITEM	TECHNICAL EVALUATION CRITERIA	Criteria Weighting	Evaluation Scoring Breakdown				Percentage score:  Criteria Weighting x evaluation score breakdown %
			0 0%	2 40%	4 80%	5 100%	
1	Storage facilities	25	No indoor storage business facility, facility lacks mentioned provisions and poses a risk to the integrity of supplied components	Roofed indoor business facility lacking two or more of the following <ul style="list-style-type: none"> <li>- Proper shelving</li> <li>- Proper floor markings / demarcated areas</li> <li>- No materials / inventory management</li> </ul>	Roofed indoor business facility with good housekeeping lacking either one of the following: <ul style="list-style-type: none"> <li>- Proper shelving</li> <li>- Floor markings / demarcated areas</li> <li>- materials/inventory management system</li> </ul>	Roofed indoor business facility Proper shelving and floor markings/ demarcated areas Materials/inventory management system in place Good Housekeeping	

				system in place - Good housekeeping			
2	Knowledge of QC systems assessed through an interview with 2 employees deemed relevant to the process by the tenderer.  Knowledge of how incoming shipments and orders are processed will be assessed and employees should have some documents / procedures / check sheets from previous orders to show as example	25	Non-responsive/no knowledge and no supporting documents	Poor explanation, no supporting documents	Lacks in either explanation/supporting documents	Can explain well and show supporting document	
3	Security: <b>The tenderer's facility is secure, lockable, access controlled, and reasonable measures are being taken to ensure the safeguarding of stock</b>	25	No measures in place to ensure safeguarding of components	Major security concerns	Lockable facility with minor security concerns	Lockable facility, secure facility with access control (guards, cameras, etc)	
4	Tenderers facilities are located within a 100km travel distance from Lethabo Power Station	25	>201km	151-200km	101-150km	Less than 100km	

### 3.7 TET MEMBER RESPONSIBILITIES

**Table 8: TET Member Responsibilities**

Mandatory Criteria Number	TET 1	TET 2	TET 3	TET 4	TET 5	TET 6	TET 7	TET 8	TET 9
1	X	X	X	X	X	X	X	X	X
2	X	X	X	X	X	X	X	X	X
Desktop Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4	TET 5	TET 6	TET 7	TET 8	TET 9
1	X	X	X	X	X	X	X	X	X
2	X	X	X	X	X	X	X	X	X
3	X	X	X	X	X	X	X	X	X
4	X	X	X	X	X	X	X	X	X
Site Visit Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4	TET 5	TET 6	TET 7	TET 8	TET 9
1	Due to the logistics of conducting site visits, a minimum of any three members will be required to conduct the site visit and perform the evaluation in line with the set-out criteria								
2									
3									
4									

TET member 1 (lead evaluator) will be responsible for the consolidation of scores as well as the clarification of discrepancies and disagreements in scoring within each discipline, in line with the tender technical evaluation procedure requirements

### 3.8 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

#### 3.8.1 Risks

**Table 9: Acceptable Technical Risks**

<b>Risk</b>	<b>Description</b>
1.	

**Table 10: Unacceptable Technical Risks**

<b>Risk</b>	<b>Description</b>
1.	

#### 3.8.2 Exceptions / Conditions

**Table 11: Acceptable Technical Exceptions / Conditions**

<b>Risk</b>	<b>Description</b>
1.	

**Table 12: Unacceptable Technical Exceptions / Conditions**

<b>Risk</b>	<b>Description</b>
1.	Deviations from the specification without informing the client
2.	

#### **4. AUTHORISATION**

This document has been seen and accepted by:

<b>Name</b>	<b>Designation</b>
	Turbine Plant Engineering Manager
	Boiler Plan Engineering Manager
	Electrical Engineering Manager
	Outside Plant Engineering Manager
	Lead Evaluator, Design and Specification
	Boiler Plant Engineering
	Boiler Plant Engineering
	Electrical Engineering
	Electrical Engineering
	Outside Plant Engineering
	Outside Plant Engineering
	Turbine Plant Engineering

#### **5. REVISIONS**

<b>Date</b>	<b>Rev.</b>	<b>Compiler</b>	<b>Remarks</b>
July 2025	0.1		First Draft for comments
Aug 2025	1.0		Final version to be used for tendering
October 2025	2.0		Updated criteria after multidisciplinary squad check

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

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

- TET members

#### **7. ACKNOWLEDGMENTS**

- TET members

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