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**Compiled by**

**T Mathe**  
**Senior Technologist**  
**Substation Engineering**

Date: 23/06/2023

**Reviewed by**

**B Hajee**  
**Chief Engineer**  
**Substation Engineering**

Date: 23/06/2023

**Authorised by**

**A Maneli**  
**Middle Manager**  
**Substation Engineering**

Date: 23/06/2023

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## 1. INTRODUCTION

This document establishes the technical evaluation strategy for the evaluation of tenders that will be received in response to the request to tender for the work to be done at [<Insert the Substation Name>](#). This strategy is a high-level consideration of the key aspects that will give direction to the technical evaluation process for civil works. It is in accordance with the Tender Engineering Evaluation Procedure (240-48929482) [1].

This document covers the work required for the civil works at [<Insert the Substation Name>](#).

## 2. SUPPORTING CLAUSES

### 2.1 SCOPE

This document covers the technical evaluation strategy for the evaluation of the tenders for [<Insert the Project Name>](#).

The aim of this document is to provide a technical evaluation strategy that shall be used for the technical evaluation of the tenders for civil works at Upington Substations. Furthermore, it will ensure transparency in the evaluation process as per the requirements set out in the Tender Engineering Evaluation Procedure (240-48929482) [1].

#### 2.1.1 Purpose

The purpose of this tender technical evaluation criteria strategy is to define the Technical Returnable, 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 document shall apply to the [<Insert the Project Name>](#) at [<Insert the Substation Name>](#) in the [<Insert the Grid Name>](#).

## 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 Engineering Evaluation Procedure
- [2] 32-1034: Eskom Procurement and Supply Management Procedure
- [3] TST41-877: Transmission Substation Design Earthing Standard
- [4] SANS 1200: Standard Specification for Civil Engineering Construction
- [5] OHS Act, 1993: Construction Regulations, 2014

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**2.2.2 Informative**

None

**2.3 DEFINITIONS**

**2.3.1 Classification**

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

**2.4 ABBREVIATIONS**

**Table 1: List of Abbreviations**

<b>Abbreviation</b>	<b>Description</b>
CV	Curriculum Vitae
EDWL	Engineering Design Work Lead
LDE	Lead Discipline Engineer
N/A	Not Applicable
OHSA	Occupational Health and Safety Act
ORHVS	Operating Regulations for High Voltage Systems
SANS	South African National Standards
TET	Technical Evaluation Team
TST	Transmission Standard

**2.5 ROLES AND RESPONSIBILITIES**

**Engineering Manager:** All Engineering Managers throughout Eskom 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. 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.

**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.

**2.6 PROCESS FOR MONITORING**

N/A

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## 2.7 RELATED/SUPPORTING DOCUMENTS

N/A

## 3. TENDER TECHNICAL EVALUATION STRATEGY

### 3.1 SCOPE OF WORK

The scope of work for this tender, forms part of the civil works at <Insert the Substation Name> as part of the <Insert the Project Name>.

The scope of work will compromise of the following or some of the following:

<Tick applicable scope>

a) Foundations and/or Plinths	
b) Cable Trenches	
c) Earthworks	
d) Roads	
e) Drainage	
f) Yardstone	
g) Buildings	
h) Fencing	
i) Steelwork <ul style="list-style-type: none"> <li>• Columns &amp; Beams</li> <li>• Equipment support structure</li> <li>• Floodlight mast</li> </ul>	
j) Security lighting	
k) Earthmat & earthtails	
l) Substation electrical in buildings <ul style="list-style-type: none"> <li>• Lighting installation</li> <li>• Ventilation installation</li> <li>• Electrical installation (DB)</li> </ul>	

### 3.2 TECHNICAL EVALUATION THRESHOLD

The scoring for each tender will be done as per the scoring table shown below. This table is as per the requirements of Tender Engineering Evaluation Procedure [1]. The minimum weighted average score required for the tender to be considered technically acceptable is 70%.

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**Table 2: Evaluation Scoring Table**

Score	Percentage	Definition
5	100	<b>COMPLIANT</b> Meet technical requirement(s) AND; No foreseen technical risk(s) in meeting technical requirements.
4	80	<b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS</b> Meet technical requirement(s) with; Acceptable technical risk(s) AND/OR; Acceptable exceptions AND/OR; Acceptable conditions.
2	40	<b>NON-COMPLIANT</b> Does not meet technical requirement(s) AND/OR; Unacceptable technical risk(s) AND/OR; Unacceptable exceptions AND/OR; Unacceptable conditions.
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.  <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>		

**3.3 TET MEMBERS**

**Table 3: TET Members**

TET number	TET Member Name	Designation
TET 1	TBA closer to evaluation	<Designation>
TET 2	TBA closer to evaluation	<Designation>

**3.4 TECHNICAL RETURNABLES**

The following documents shall be submitted when tendering:

- a) Construction Program/Technical Schedule. A program with the order in which main activities will be done with time durations from start to end.
- b) Method statements (including detailed step-by-step procedures) for the following:

<List all applicable scope as ticked from Section 3.1>

The following to form part of the method statements if the scope of work include the concrete works:

[Method of Concrete mix](#)

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The contractor to specify the method of concrete placement, batching on site or supply of ready mix. If Batching – the contractor to provide the following:

- Concrete Mix design;
- Aggregate to be used;
- Location/supplier of aggregate; and
- Mixing and testing are to be included in the method statement.

If ready mix – the contractor shall provide the following:

- The supplier of Ready mix and the distance from site;
- Method on how results (and what results) will be obtained from the supplier; and
- Method on how concrete will be tested on site

- c) List of subcontractors to be used.
- d) List of all tools and equipment to be used.
- e) List of relevant and comparable projects undertaken. The list shall include project scope, substation name, completion date, project value and client contact person and details. The contractor shall further include any concessions made during each project execution.
- f) List of key personnel, their experiences (include CV detailing project-specific work experience for each employee) and academic qualifications. Also include total number of manpower to be dedicated to this project.

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### 3.5 QUALITATIVE TECHNICAL EVALUATION CRITERIA (A)

Compliant tenders will be evaluated against a set of weighted qualitative evaluation criteria. The evaluation criterion has been broken down into sections and a percentage weighting has been allocated to each section. Percentage weighting summary figures is indicated in Table 4 below. For details of the requirements for criteria scoring, see appendix A.

**Table 4: A: Substation Civil Works Qualitative Technical Evaluation Criteria**

	Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)	Score Clarification
<b>A1</b>	<b>Construction Program/Technical Schedule</b>			<b>20</b>		
	1.1	A program with the order in which main activities will be done			60	All activities listed in order = 5, Few irrelevant activities or few missing = 4, Missing a lot of activities or mostly irrelevant = 2, no submission = 0
	1.2	Time durations of main activities from start to end			40	Duration make sense with all activities = 5, Duration make sense but missing few activities = 4, Most duration does not make sense = 2, No duration specified = 0
<b>A2</b>	<b>Construction/method statements</b>			<b>30</b>		
	2.1	Relevancy of method statements with a description of how the main activities will be constructed			100	Relevant, well detailed and all required submitted = 5(if any irrelevant submitted, to be ignored), Missing 20% of the required or few important steps/activities missed = 4,

						Mostly irrelevant submitted and with very few relevant or basic submitted =2, Irrelevant or none provided = 0
<b>A3</b>	<b>List of Subcontractors</b>			10		
	3.1	Any company supplying material, plant and equipment that the contractor may hire. List company with the material, plant and equipment which they are supplying			40	All companies with all relevant material, plant and/or equipment listed = 5, Few supplies missing = 4, Only companies listed or only material listed = 2, No submission = 0
	3.2	Specify if there will be any company/contractor performing any construction work not done by the main contractor			60	Specified if there will be a subcontractor and specified which construction work or specified no subcontractor = 5, Only specified if there will be a Subcontractor = 2, None provided = 0
<b>A4</b>	<b>List of Tools, Plant and Machinery</b>			<b>10</b>		
	4.1	All relevant earthing tools, plant and machinery to be used during construction owned by the contractor. (All hired to be included in the list of subcontractor			100	All relevant listed and indicated if owned = 5, Few missing = 4, Mostly irrelevant = 2, None provided = 0
<b>A5</b>	<b>Relevant company experience</b>			<b>20</b>		

	5.1	List of relevant and comparable previous projects executed successfully			60	>5 Projects = 5 ; 4 to 2 projects = 4 ; 1 project = 2 ; none
	5.2	Including project scope, completion date and client contact person and details			40	Well defined project scope, completion date and client contact person details provided (When all 3 requirements are provided) = 5 ; When any of project scope, completion date or client contact person and details is missing (When only 2 requirements are provided = 4; When one of project scope , completion date and client contact person and details is provided (When only one of the requirements is provided) = 2 ; None provided = 0
<b>A6</b>	<b>Qualifications and experience of key personnel</b>			<b>10</b>		
	6.1	CVs of Construction Manager/Project Manager, Site Manager/Site Agent and Site Supervisor			40	All required CVs provided = 5 ; Missing 1 CV = 4 ; Only 1 CV submitted = 2 ; none provided = 0
	6.2	CVs to include academic qualifications and experience of key personnel detailing relevant project specific work experience			30	All personnel meet the minimum qualification and experience = 5. (All key personnel to meet minimum requirements to achieve maximum score); Any of the

						key personnel not meeting the required qualification and experience = 2
	6.3	Proof/copies of certified academic qualifications			30	All qualifications mentioned in 6.1 & 6.2 provided = 5 (if all certified = 5 and not certified = 0) "Uncertified documents cannot be verified and therefore will results in documents not being accepted".
				<b>TOTAL:</b>		
				<b>100</b>		

### 3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

#### 3.6.1 Risks

**Table 5: Acceptable Technical Risks**

Risk	Description
1.	None.

**Table 6: Unacceptable Technical Risks**

Risk	Description
1.	Contractors who do not have the relevant experience.

#### 3.6.2 Exceptions / Conditions

**Table 7: Acceptable Technical Exceptions / Conditions**

Risk	Description
1.	None.

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

Risk	Description
1.	None.

#### 4. AUTHORISATION

This document has been seen and accepted by:

<In the table below, list all TET members>

Name	Designation

#### 5. REVISIONS

Date	Rev.	Compiler	Remarks
<Month 20xx>	<X>	Insert initials and surname.	Specify reasons for compiling of document.

#### 6. DEVELOPMENT TEAM

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

<Insert text here>

#### 7. ACKNOWLEDGEMENTS

<Insert text here>

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