



Strategy

Maintenance

Title: **Tender Technical Evaluation Strategy Supply and Delivery of Positioners and Switches used on Control and Instrumentation (C&I) Related Equipment**

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1. INTRODUCTION

Medupi Power Station relies on various Control and Instrumentation (C&I) systems to ensure the safe, reliable, and efficient operation of plant processes. Positioners and switches are critical components within these systems, providing essential control, monitoring, indication, and protection functions. The availability of these components is necessary to support planned and corrective maintenance activities, minimize equipment downtime, and maintain plant reliability.

This document outlines the Eskom technical evaluation criteria to be applied when assessing tender submissions for the **Supply and Delivery of Positioners and Switches used on C&I-related equipment at Medupi Power Station for a period of three (3) years**. It further provides the technical evaluation methodology and supporting annexures that will be used to evaluate compliance with Eskom's technical, quality, and operational requirements.

2. SUPPORTING CLAUSES

2.1 SCOPE

This document contains the technical evaluation criteria and associated documents relating to a commercial enquiry for the technical evaluation of the **Supply and Delivery of Positioners and Switches used on Control and Instrumentation (C&I) equipment contract**.

The technical evaluation team members are listed and appointed in this document along with their responsibilities.

The technical evaluation requirements consist of the following criteria:

Mandatory Evaluation Criteria

Qualitative Evaluation Criteria

Once the Technical Evaluation Strategy is authorised no changes will be made to the evaluation criteria without appropriate authorisation.

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 the tender technical evaluation. The technical evaluation strategy serves as the basis for the tender technical evaluation process.

2.1.2 Applicability

This document shall apply to Medupi Power Station **Supply and Delivery of Positioners and Switches used on Control and Instrumentation (C&I) equipment contract**.

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

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[2] 32-1034: Eskom Procurement Policy

2.2.2 Informative

- [1] ISO 9001: Quality management systems
- [2] ISO 14001: Environmental Management systems
- [3] 474-59: Internal Audit Procedure

2.3 DEFINITIONS

Definition	Description
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.
Local	Within the borders of the Republic of South Africa
Tender	A tender refers to an open or closed competitive request for quotations / prices against a clearly defined scope / specification.

2.3.1 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
C&I	Control and Instrumentation.
NEC3	New Engineering Contract
OEM	Original Equipment Manufacturer
PD	Order On Request (As and When required)
QC	Quality Control
RF	Refurbishment of items
SHEQ	Safety Health Environmental and Quality
SOW	Scope of Work.
V1	Re-Order Point for Non-Repairable Material (Normal)
VB	Manual Re-Order Point Planning (RF)
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

- Process for Monitoring

This procedure shall be monitored by 474-59: Internal Audit Procedure

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2.6 RELATED/SUPPORTING DOCUMENTS

Tender Technical Evaluation Scoring Form

2.6.1.1 Tender Technical Evaluation Strategy

2.7 TECHNICAL EVALUATION THRESHOLD

This section details the methodology to be used by Eskom in scoring the technical category of the tender evaluation. This evaluation is performed by the appointed Eskom TET.

The evaluation of tenders will be based on the tenderer's ability to meet the technical requirements. The evaluation consists of mandatory criteria and qualitative criteria. The results of the mandatory evaluation will be recorded as "compliant" or "non-compliant". Tenderers that are assessed as non-compliant in any mandatory criterion shall be disqualified and will not proceed to the qualitative evaluation stage.

The qualitative evaluation shall apply a weighted scorecard approach to evaluate tenders against the specifications and the employer's requirements. The scorecard below will be used.

Table 1: Qualitative Evaluation Criteria Scoring Table

Score	Weighted score %	DESCRIPTION
5	100	COMPLIANT - Meets the technical requirement(s) AND - No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS - Meets the technical requirement(s) with: - Acceptable technical risk(s) AND/OR - Acceptable exceptions AND/OR - Acceptable conditions.
2	40	NON-COMPLIANT - Does not meet the technical requirement(s) AND/OR - Has unacceptable technical risk(s) AND/OR - Has unacceptable exceptions AND/OR - Has unacceptable conditions.
0	0	TOTALLY DEFICIENT OR NON-RESPONSIVE

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

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- TET Members

Table 2: TET Members

TET number	TET Member Name	Designation
TET 1	Vusi Mosime	C&I System Engineer
TET 2	Joel Manamela	C&I System Engineer
TET 3	Thys Britz	Senior Supervisor C&I Maintenance
TET 4	Ernest Morolong	Senior Technician C&I Maintenance

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2.8 MANDATORY TECHNICAL EVALUATION CRITERIA

Table 3: Mandatory Technical Evaluation Criteria

Mandatory Technical Evaluation Criteria		Reference to Technical Specification / Tender Returnable	Motivation & Comments
1.	Relationship with OEM / Accredited Suppliers	The contractor must: 1. Provide a formal OEM commitment letter, or a valid certificate of partnership/accreditation, which explicitly confirms the OEM's full commitment to support the bidder in the supply of genuine spare parts.	The OEM commitment letter must be addressed to the Contractor.

2.9 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 4: Qualitative Technical Evaluation Criteria

Technical Evaluation Criteria			Guideline / Notes
Technical Criteria Description		Sub-criteria weighting (%)	
1. Compliance to Eskom Specification	Weighting =	35%	
<i>General measure in line with the product specification</i>			
1.1	Provide supply and delivery services for positioners and switches used on C&I-related equipment to the Employer in accordance with 241-20221077: Medupi Power Station Supply and Delivery of Positioners and Switches Used on C&I-Related Equipment Scope of Work. The tenderer shall submit a comprehensive technical proposal including the following: - Product Information Sheets for all offered materials. - A Performance Guarantee from the manufacturer. - Details on spares supply and a clear schedule of lead times.	100%	Scoring: 5 - Product Information Sheet, Performance Guarantee, and spares supply lead times with schedule provided. 4 - Any two of the following are provided: Product Information Sheet, Performance Guarantee, and spares supply lead times with schedule. 2 - Any one of the following is provided: Product Information Sheet, Performance Guarantee, and spares supply lead times with schedule. 0 - None of the following are provided: Product Information Sheet, Performance Guarantee, and spares supply lead times with schedule.
Compliance to Eskom Specification Score:			

2. Previous Experience	Weighting =	15%	
<i>Reference list of completed purchase orders or task orders for previous similar work.</i>			
2.1	The contractor shall provide a reference list of previous projects that demonstrates their relevant experience. This list must include a minimum of three completed spares supply contracts/task orders that span at least three years of experience. For each reference, the contractor must provide the project title, the client's name and contact information, and the contract's duration. All task orders/contracts must be related to the supply of C&I spares.	100%	Scoring: 5 - A reference list with three or more completed C&I spares supply and delivery contracts/task orders is provided, demonstrating a minimum of three years' relevant experience. 4 - A reference list with two completed C&I spares supply and delivery contracts/task orders is provided, demonstrating a minimum of three years' relevant experience. 2 - A reference list with one completed C&I spares supply and delivery contract/task order is provided. 0 - No reference for completed C&I spares supply and delivery contracts/task orders is provided.
Previous Experience Score:			
3. Parts Sourcing	Weighting =	20%	
<i>Parts Sourcing</i>			

3.1	The contractor must demonstrate the capability to plan, manage, and meet agreed supply timelines for the delivery of required spares in accordance with the contract requirements. Scoring will be based on the following elements: - Documented lead-time commitments aligned to the contract or scope of work. - Defined supply planning approach, including order processing, scheduling, and coordination. - Evidence of the ability to consistently meet declared supply timelines. Evidence may include documented historical performance, delivery records, or client references confirming adherence to agreed timelines.	100%	Scoring: 5 – All 3 elements provided with verifiable supporting evidence 4 – Any 2 elements provided 2 – Only 1 element provided 0 – No relevant information provided
Parts Sourcing:			
4. Technical Resource Capability	Weighting =	10%	
<i>Technical Resource Capability</i>			

4.1	The supplier must show access to at least one qualified C&I technical resource assigned to the contract by providing an organogram, qualifications, and relevant experience. This must demonstrate the capability to support spares identification, verification, and technical queries. Recognised C&I qualifications include a National Diploma, BTech, or Degree in C&I/Electrical Engineering, or Trade Test: Instrumentation Technician or Millwright with C&I exposure. All qualifications and experience must be supported by CVs and certified copies of qualifications.	100%	Scoring: 5 – Structured organogram provided, at least one qualified C&I technical resource, and ≥5 years relevant C&I experience clearly demonstrated 4 – Organogram and qualified technical resource provided with 3–5 years relevant experience 2 – Organogram provided but: • No qualified C&I resource, OR • Less than 3 years relevant experience, OR • Role not clearly linked to contract 0 – No technical resource information provided
Technical Resource Capability			
5. Technical Quality Assurance	Weighting =	20%	
<i>Quality Assurance</i>			
5.1	The service provider shall demonstrate the capability to manage the logistics, handling, quality assurance, and delivery integrity of C&I spares. Evidence shall include, but not be limited to: • Valid ISO 9001 Quality Management System certification. • Quality Assurance (QA) procedures. • Quality Control (QC) procedures. • Inspection and Test Plans (ITPs) or equivalent inspection processes. • Material traceability and tracking procedures.	100%	Scoring: 5 - A valid ISO 9001 certificate is submitted, and all five supporting quality documents are provided: QA Procedure, QC Procedure, ITP/Inspection Process, Traceability Procedure, and Logistics/Handling Procedure. The documents are detailed, implemented, and auditable. 4 - A valid ISO 9001 certificate is submitted, and at least three of the five supporting quality documents are provided. The procedures are adequate but may contain minor gaps or lack detail in some areas. 2 - At least three supporting quality documents are provided. The quality system is partially

	Logistics, storage, handling and packaging procedures.		demonstrated, but key controls are missing or insufficiently documented. 0 - No valid ISO 9001 certificate is submitted, or no supporting QA/QC documentation is provided. The supplier has not demonstrated an acceptable quality management system for the supply of C&I spares.
Technical Quality Assurance:			
Final score for TET:			

2.10 TET MEMBER RESPONSIBILITIES

Table 5: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2	TET 3	TET 4
1. Relationship with OEM / Accredited Suppliers	X	X	X	X
Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4
1. Compliance to Eskom Specification	X	X	X	X
2. Previous Experience	X	X	X	X
3. Parts Sourcing	X	X	X	X
4. Technical Resource Capability	X	X	X	X
5. Technical Quality Assurance	X	X	X	X

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2.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

2.6.1 Risks

Table 6: Acceptable Technical Risks

Risk	Description
1.	Deviation from the specified equipment is acceptable only where a technically equivalent item is available and does not require modification to the operating plant.

Table 7: Unacceptable Technical Risks

Risk	Description
1.	Failure to provide a valid confirmation of supply letter from the original equipment manufacturer or approved local supplier for spares that require such letters as per the BOM.

2.6.2 Exceptions / Conditions

Table 8: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	Suppliers/Tenderers that are non-OEMs.
2.	Signed letters from OEMs or OEM-approved local suppliers addressed to non-OEM suppliers/tenderers.

Table 9: Unacceptable Technical Exceptions / Conditions

Risk	Description
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1.	The supplier/tenderer does not meet all mandatory criteria.
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3. AUTHORISATION

This document has been seen and accepted by:

Name	Designation
Ernest Morolong	Senior Technician C&I Maintenance
Thys Britz	Senior Supervisor C&I Maintenance
Lerato Sehume	Manager Technical Support
Vusi Mosime	Engineer C&I Engineering
Shu Mpangase	Engineer C&I Engineering
Letago Manyelo	Engineer C&I Engineering
Nare Senama	Senior Supervisor C&I Maintenance
Derrick Chauke	Manager C&I Engineering
Cornelius Mulaudzi	Senior Supervisor C&I Maintenance
Joel Manamela	Engineer C&I Engineering
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4. REVISIONS

Date	Rev.	Compiler	Remarks
June 2025	1	Ernest Morolong	Original document
June 2026	2	Cornelius Mulaudzi	Updated the document and modified the mandatory criteria to request OEM letters and ISO 9001:2015 certification. Updated Qualitative Criteria 3 and 5 to indicate the exact documents required as proof. Added the requirement for support from the system engineer.

5. DEVELOPMENT TEAM

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

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6. ACKNOWLEDGEMENTS

None

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