

 Eskom	Strategy	Engineering
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Title: **Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers**

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Compiled by



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Date: 29/09/2026

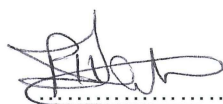
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CONTENTS

	Page
1. INTRODUCTION	3
2. SUPPORTING CLAUSES	3
2.1 SCOPE	3
2.1.1 Purpose	3
2.1.2 Applicability	3
2.2 NORMATIVE/INFORMATIVE REFERENCES	3
2.2.1 Normative	3
2.2.2 Informative	3
2.3 DEFINITIONS	4
2.3.1 General	4
2.3.2 Classification	4
2.4 ABBREVIATIONS	4
2.5 ROLES AND RESPONSIBILITIES	4
2.6 PROCESS FOR MONITORING	5
2.7 RELATED / SUPPORTING DOCUMENTS	5
3. TENDER TECHNICAL EVALUATION STRATEGY	5
3.1 TECHNICAL EVALUATION THRESHOLD	5
3.2 TET MEMBERS	5
3.3 MANDATORY EVALUATION CRITERIA	6
3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA	8
3.5 TET MEMBER RESPONSIBILITIES	17
3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS	18
3.6.1 Risks	18
3.6.2 Exceptions / Conditions	19
4. AUTHORISATION	20
5. REVISIONS	20
6. DEVELOPMENT TEAM	20
7. ACKNOWLEDGEMENTS	20
8. APPENDIX A: BACKGROUND AND EXPERIENCE OF SIMILAR COMPLETED	21

TABLES

Table 1: TET Members	5
Table 2: Mandatory Technical Evaluation Criteria	6
Table 3: Qualitative Evaluation Criteria	8
Table 4: Qualitative Technical Criteria Technical Specifications	9
Table 5: TET Member Responsibilities	17
Table 6: Acceptable Technical Risks	18
Table 7: Unacceptable Technical Risks	18
Table 8: Acceptable Technical Exceptions / Conditions	19
Table 9: Unacceptable Technical Exceptions / Conditions	19
Table 10: Background and Experience of Similar Completed	21

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1. INTRODUCTION

This technical evaluation document will be used to determine the suitable and qualifying supplier to offer services for the supply, installation, commissioning, maintenance, refurbishment and supply of spares for water-cooled chillers and direct expansion units for the HVAC system at Eskom Kendal Power Station.

2. SUPPORTING CLAUSES

2.1 SCOPE

Supply, installation, commissioning, maintenance, refurbishment and supply of spares for water-cooled chillers and direct expansion units for the HVAC system at Eskom Kendal Power Station.

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's responsibilities for the tender technical evaluation process. This strategy serves as an ultimate guide for the tender technical evaluation process.

2.1.2 Applicability

This document applies only to the HVAC system at Eskom Kendal 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] *1037767 Kendal Power Station Procurement Purchase Requisition Compliance Checklist
- [3] 32-188, Eskom's Procurement and Supply Chain Management Procedure

2.2.2 Informative

- [4] Occupational Health and Safety Act 85 of 1993
- [5] 32727, SHEQ policy

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2.3 DEFINITIONS

2.3.1 General

Definition	Description
Component	Any self-contained part, combination of parts, subassemblies or units, which perform a distinctive function necessary to the operation of a system.
Eskom Life Saving rules	Are safety rules designed to keep all employees and visitors safe at all times, so that they must be acted upon at all times.
Maintenance	A combination of all technical, administrative and managerial actions during the lifecycle of an item intended to retain it in, or restore it to, a condition in which it can perform its required function.
Material deviations	It is the non-conforming deviation to the technical requirements e.g. has the detrimental effects on the scope or quality or performance of works as identified in the Scope of Works.
Method Statement	A written document detailing the key activities in sequence to be performed in order to successfully complete the work tasks while ensuring as practical reasonable that all risks and hazards identified are reduced.
Minimum Weighted Final Score	The final highest technically ranked score after consolidating all individual scoring by TET members recommended from a technical perspective provided this score exceeds the 75% threshold.
Qualitative Evaluation Criteria	Weighted evaluation criteria used to identify the highest technically ranked tenderer in this case Mandatory Evaluation Criteria are not the pre requisite
Responsive tender	It is the tender that conforms to all terms, condition and specifications of the tender documents without material deviations or qualifications.
Safe Handling Method	It is the procedure that describes how equipment is to be handled in a safe and standardised process.

2.3.2 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
QCP	Quality Control Procedure
SD&L	Supplier, development and localization
SHEQ	Safety Health Environment & Quality
SOW	Scope of Work
TET	Tender Evaluating Team

2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

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2.6 PROCESS FOR MONITORING

The evaluator will be required to complete the Technical Evaluation Team Member Appointment Letter form, **240-106871290** and MUST provide the evaluation memorandum to the TET which he or she will utilise, prior conducting the evaluation. For the outcome monitoring of the evaluation's quality, evaluations will be done individually by a minimum of two (2) TET members, each using Tender Technical Evaluation Scoring form, **240-53716726** to evaluate each tenderer. The results deviations below 10% will be averaged but if above 10% will be collectively audited by not less than three (3) TET members including evaluators to ascertain the reason of discrepancy and if no conclusion is reached senior manager will be consulted.

It must be noted that the **70%** threshold will assist with the grading of the submissions but the responsive tender is vital for the successful execution of the complete work.

2.7 RELATED / SUPPORTING DOCUMENTS

N/A as per Tender Engineering Evaluation Procedure number 240-48929482.

3. TENDER TECHNICAL EVALUATION STRATEGY

Process will follow an open tender process with only Qualitative Technical Evaluation criteria used for the evaluation process. Qualitative Technical Evaluation will follow the weighted evaluation route with the necessary supporting document/s provided. Only the tenderers that have achieved a total score of 75% under qualitative criterion will be considered.

3.1 TECHNICAL EVALUATION THRESHOLD

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

3.2 TET MEMBERS

Table 1: TET Members

TET number	TET Member Name	Designation
TET 1	Amanda Mbatha	EMD Manager
TET 2	Mphalela Mokonyane	Auxiliary Engineering System Engineer
TET 3	Bonginkosi Mathe	Chief Engineer
TET 4	Mzwandile Gcaleka	Auxiliary Engineering Manager

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3.3 MANDATORY EVALUATION CRITERIA

Mandatory criteria (gatekeepers) are 'must meet' criteria. These criteria shall not be weighted or point scored but shall be assessed on a Yes/No basis as to whether or not the criteria are met. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Qualitative Criteria. Table 2 indicates the mandatory evaluation criteria

Table 2: Mandatory Technical Evaluation Criteria

No'	Mandatory Technical Criteria Description (Yes/No)	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1.	Has the Tenderer confirmed that they have a track record of five completed projects as a minimum: for maintenance, construction, commissioning and testing of HVAC systems? a) Submit a written confirmation stating that the supplier has completed at least 5 projects in HVAC systems	Tender Returnable Provide testimonial certificates or completion certificates of at least five (5) HVAC related projects (maintenance, construction, commissioning and testing of HVAC system) The testimonial certificates or completion certificates is to consist of the following information: a) Name of company where project was executed b) Project Description c) Construction/Contract period d) Verifiable reference (Contact person) Note 1: Appointment letters will not be considered. Note 2: If item b, c and d is not indicated on the testimonial certificate or completion certificates, the tender is to provide the information as an attachment to the testimonial certificate or completion certificate. Note 3: If the project description is not provided or not comparable to the SoW, the	Previous similar work experience and key personnel allocated to the contract should be documented. This is to ensure that the Tenderer has the capability to undertake the Works.

**Technical Evaluation Strategy for Supply, Installation,
Maintenance and Spares Supply of HVAC Chillers**

Unique Identifier:

Revision: **00**

Page: **7 of 22**

		testimonial or completion certificate will not be considered. Note 4: The Tender to complete Appendix A of this document, corresponding to the testimonial or completion certificates provided.	
2.	Proof of registration with a professional body – SARRACCA	Tender Returnable • The Contractor should provide details of a SAQCC Gas registered practitioner(s). • The practitioner should possess Levels A, B, C competency according to SANS 10147 (Annexure D)	This is to ensure that the Tenderer has the capability to undertake the Works and handling of HVAC gases

3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Tenderers that have met all the Mandatory Evaluation Criteria shall be evaluated against the Qualitative Criteria as defined in the Tender Technical Evaluation Strategy. The scoring of 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 Table 3: Qualitative Evaluation Criteria Scoring Table, for each technical qualitative criterion. During the tender evaluations the following table shall be used by the TET members to score each criterion on a scale of 0 to 5 as per Table 3.

Table 3: Qualitative Evaluation Criteria

Score	(%)	Definition
5	100	COMPLIANT - Meet technical requirement(s) AND; - No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS Meet technical requirement(s) with; - Acceptable technical risk(s) AND/OR; - Acceptable exceptions AND/OR; - Acceptable conditions.
2	40	NON-COMPLIANT - Does not meet technical requirement(s) AND/OR; - Unacceptable technical risk(s) AND/OR; - Unacceptable exceptions AND/OR; - Unacceptable conditions.
0	0	TOTALLY DEFICIENT OR NON-RESPONSIVE
Note 1: The scoring table does not allow for scoring of 1 and 3. Note 2: Foreseen acceptable and unacceptable risk(s), exceptions and conditions shall be unambiguously defined in the relevant Tender Technical Evaluation Strategy.		

The Qualitative Criteria shall be used to evaluate the following technical specifications in Table 4

Table 4: Qualitative Technical Criteria Technical Specifications

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
1.	Contractor to demonstrate the number of years of experience	The tenderer shall submit a minimum of five (5) valid purchase orders with contactable references that are dated and indicate the company's number of years of experience. The tenderer shall provide purchase orders that indicate at least 6 years working experience and more	25%	No purchase order submitted/Zero (0) number of years of experience demonstrated	A minimum of five (5) valid purchase orders with contactable references that are dated and indicate the company's number of years of experience of one (1) to two (2) years	A minimum of five (5) valid purchase orders with contactable references that are dated and indicate the company's number of years of experience of three (3) to five (5) years	A minimum of five (5) valid purchase orders with contactable references that are dated and indicate the company's number of years of experience of at least six (6) years and more
2.	Contractor's demonstrated experience in the installation and servicing of HVAC cooling equipment	- The tenderer shall submit a minimum of five (5) relevant Quality Control Plans (QCPs). - Each QCP shall relate to installation and/or servicing work performed on one or more of the following equipment categories: water-cooled chillers, air-cooled chillers,	25%	No relevant QCP submitted, or the tenderer submitted only generic blank templates, unrelated documents, or QCPs that do not relate to installation or servicing	Less than five (5) acceptable QCPs submitted. One (1) to four (4) acceptable and distinct QCPs submitted. The minimum requirement of five (5) acceptable QCPs is not met.	Five (5) or more acceptable and distinct QCPs submitted, but the QCPs demonstrate only installation experience or only servicing experience on water-cooled chillers, air-cooled chillers, and/or DX units; or the QCP information contains minor omissions that do not prevent	Five (5) or more acceptable and distinct QCPs submitted. Collectively, the QCPs demonstrate both installation and servicing experience on water-cooled chillers, air-cooled chillers, and/or DX units, and clearly identify the relevant scope, equipment type, quality-control activities, inspection or witness points, hold points, and QCP sign-off or acceptance.

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:

Revision: 00

Page: 10 of 22

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		- or direct expansion (DX) units. - Each submitted QCP shall clearly identify the client or project, equipment type, scope of work, date of execution period, applicable inspection or witness points, hold points, quality-control activities, and evidence of sign-off or acceptance within the QCP. - Installation QCPs shall cover installation-related quality activities, as applicable, including equipment positioning, mechanical and electrical connections, pressure or leak testing, inspection, testing, and		of water-cooled chillers, air-cooled chillers, or DX units.		verification of relevance.	

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:

Revision: **00**

Page: **11 of 22**

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		commissioning controls. • Servicing QCPs shall cover maintenance-related quality activities, as applicable, including inspections, servicing, repairs, replacement of components, operational testing, and return-to-service controls. • Only distinct and relevant QCPs shall be counted. Duplicate copies, generic blank templates, method statements, procedures, inspection sheets submitted without an associated QCP, and QCPs unrelated to the specified HVAC equipment shall not be counted.					

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:

Revision: 00

Page: 12 of 22

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
3.	Contractor's accreditation and experience for Carrier chiller installations, repairs and maintenance	The Tenderer shall submit: 1. A valid letter or certificate issued by an HVAC OEM, or an authorised HVAC OEM representative, confirming that the tenderer is currently accredited or authorised to install, repair and maintain water-cooled chillers. 2. Valid purchase orders, contracts or appointment letters demonstrating completed water chiller installation, repair or maintenance work.	20%	No valid accreditation or authorisation evidence submitted; OR no acceptable evidence of completed chiller work submitted. A submission that fails either mandatory evidence requirement scores zero.	Valid accreditation or authorisation evidence submitted, together with acceptable proof of two completed water-cooled chiller projects or Contracts, each supported by a contactable Client reference.	Valid accreditation or authorisation evidence submitted, together with acceptable proof of three or four completed water-cooled chiller projects or contracts, each supported by a contactable Client reference.	Valid accreditation or authorisation evidence submitted, together with acceptable proof of five or more completed water cooled-chiller projects or contracts, each supported by a contactable client reference.

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:
Revision: 00
Page: 13 of 22

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		Each experience record shall identify the Client, scope of work, water cooled chiller model or type, date or Contract period, purchase-order or contract number, and a contactable Client reference.					
4.	Contractor's Methodology and Technical Execution Capability	Tender Returnable 1. A project-specific methodology statement, limited to a maximum of five (5) A4 pages excluding supporting appendices. 2. Clear understanding of the scope and interfaces for water-cooled chillers and direct expansion	30%	No methodology submitted, or the submission is irrelevant, substantially incomplete, generic to the extent that it does not demonstrate an understanding of the Works or does not address any of the	A methodology is submitted but addresses fewer than six (6) of the nine (9) minimum submission requirements, or omits one or more critical areas, namely servicing/maintenance approach, inspection and commissioning, safety controls, quality controls, or rigging and lifting. The submission demonstrates limited understanding and presents	The methodology adequately addresses at least seven (7) of the nine (9) minimum submission requirements and includes all critical areas. The approach is generally project-specific, logical and executable, but contains minor omissions, assumptions, qualifications or acceptable risks that do not materially prevent successful execution.	The methodology comprehensively addresses all nine (9) minimum submission requirements. The approach is project-specific, logically sequenced, technically sound and practical, with clear responsibilities, controls, inspection and commissioning arrangements, rigging methodology, and risk mitigation. No foreseen material technical risk is identified.

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:

Revision: 00

Page: 14 of 22

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		(DX) equipment. 3. Sequence and methodology for servicing, maintenance, refurbishment, removal and installation activities applicable to the Works. 4. Inspection, testing, commissioning and performance-verification approach, including proposed records and acceptance evidence. 5. Quality-control measures, including		critical execution areas.	unacceptable execution risk.		

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		proposed inspection points, hold points and management of non-conformances. 6. Health, safety and environmental controls relevant to the proposed activities. 7. Resource allocation, supervision arrangements and responsibilities for execution. 8. Preliminary rigging and lifting methodology for major equipment, identifying lifting					

Technical Evaluation Strategy for Supply, Installation, Maintenance and Spares Supply of HVAC Chillers

Unique Identifier:

Revision: **00**

Page: **16 of 22**

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	0	2	4	5
		approach, access constraints and key controls. 9. Key execution risks, assumptions, interfaces and practical mitigation measures.					
5.	Total		100				

The weight for the technical review will be 100 % with a minimum threshold of 70% and will be based on the following:

3.5 TET MEMBER RESPONSIBILITIES

In Table 4 identify the TET members allocated to review/evaluate each Qualitative criterion (minimum 2 evaluators per criteria / sub-criteria)

Table 5: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2	TET 3	TET 4
1.	X	X	X	X
Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4
1.	X	X	X	X
2.	X	X	X	X
3.	X	X	X	X

3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

3.6.1 Risks

Table 6: Acceptable Technical Risks

Risk	Description
1.	The contractor's accreditation certificate by the OEM having first been obtained less than two years ago as of September 2026
2.	The contractor's previously done work in OEM chiller servicing being more than three years ago

Table 7: Unacceptable Technical Risks

Risk	Description
1.	Scope deviations
2.	No support documentation
3.	Unsigned and unauthenticated support documentation
4.	Team leaders experience below the minimum required
5.	Non-existence of the key critical personnel
6.	Non-attendance of site visit
7.	Proposals not reflecting Eskom Cardinal rules

3.6.2 Exceptions / Conditions

Table 8: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	Eskom reserves the right to indicate the local personnel to be trained
2.	Sub-contracting or sourcing critical skills
3.	Contractor obtaining 75% total score with all mandatory criteria met

Table 9: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	Tender returnable not complete due to non-submission of documents citing the protection of proprietary information.
2.	Lack of relevant but previous experiences
3.	The lack of competency from the required technical criteria
4.	The contractor does not agree to provide assistance to activities or information as requested by the Technical evaluation Criteria

4. AUTHORISATION

This document has been seen and accepted by:

Name	Designation
Mzwandile Gcaleka	Auxiliary Plant Engineering Manager
Mphalela Mokonyane	HVAC System Engineer
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5. REVISIONS

Date	Rev.	Compiler	Remarks
September 2026	0	Mphalela Mokonyane	New Document

6. DEVELOPMENT TEAM

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

Mphalela Mokonyane

Sazi Jele

7. ACKNOWLEDGEMENTS

None

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In addition to the Tender Technical Evaluation Strategy and other related documents applicable to the Contract, the following appendices are issued by the employer, for the tenderer complete to with the relevant information.

Table 10: Background and Experience of Similar Completed

[illegible]