



Report

Technology

Title: **TECHNICAL EVALUATION
CRITERIA FOR NEW SF6 GAS
SUPPLIED IN CYLINDERS**

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1. INTRODUCTION

This evaluation criteria shall be used to perform technical evaluation of the technical submissions from the Suppliers that tender for the supply of new SF6 gas supplied in cylinders. This evaluation exercise is performed by the Eskom technical evaluators.

This part of the evaluation starts when the technical submissions are opened for the first time. It begins at evaluation of the Mandatory Requirements Stage 1 (Table 1), then proceeds to the Functional Requirements – Stage 2 (Table 2).

2. SUPPORTING CLAUSES

2.1 Scope

This document encompasses the evaluation strategy and criteria for various SF6 Gas supplied in standard gas cylinders used on power networks within Eskom Distribution, LimLanga Cluster. It does not specify the requirements of each item as the specific requirements for the items are contained within the Technical Schedules that are attached to the respective Commercial Enquiries. This document covers only the evaluation strategy and criteria for various new SF6 Gas supplied in standard gas cylinders used on networks within Eskom LimLanga Cluster.

It does not specify the technical requirements of each item. The Eskom standard requirements, including test requirements, will be stipulated in the tender pack, and may include Eskom standards, SANS standards and other National and International standards.

2.1.1 Purpose

The purpose of this document is to standardise the technical strategy and evaluation criteria for application during formal Commercial Enquiry processes of new SF6 Gas supplied in standard gas cylinders in alignment with Eskom Holdings SOC (Ltd) policies.

2.1.2 Applicability

This document shall apply throughout Limlanga cluster of Eskom Holdings Limited when formal Commercial processes are undertaken for new SF6 Gas supplied in standard gas cylinders.

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] ISO 9001, Quality Management Systems.
- [2] 32-1034 - Eskom Procurement and Supply Chain Management Procedure
- [3] 240-48929482 rev 1 - Tender Engineering Evaluation Procedure
- [4] 240-51757553 - Provide Engineering during Project Sourcing
- [5] D-DT 2000series, 3000 series, 6000 series, 7000 series and 8000 series

2.2.2 Informative

None

2.3 Definitions**2.3.1 General**

Definition	Description
Buyer's Guide	A list or catalogue of SAP numbers and associated material descriptions.
Desktop evaluation	An evaluation of the documentation included in the tender returnable.
Enquiry returnable	Items stipulated in the Tender Enquiry, defined as mandatory, to be submitted as part of the tender submission.
Eskom Assessment Representative(s)	The person(s) appointed by Eskom to perform evaluation of tender submission(s) in line with Eskom requirements.
Functionality	The capability and capacity of a tenderer to provide goods or services in accordance with specifications as set out in the enquiry documents. Tenders evaluated on functionality must be carried out in accordance with 32-1034.
Informal Tender	It is the Procurement mechanism that may be used for transactions not exceeding the Informal Tendering lower limit as set in the Eskom DOA Policy. These transactions must be executed by a Procurement Practitioner and approved by an accredited Procurement Practitioner
Informative Reference	Represents documents that are used as additional information or useful information that relates to this document.
Mandatory Requirements	This are requirements that must be submitted by the tenderer, fail to provide any mandatory tender returnable as clearly specified in the tender enquiry, the tender submission will be deemed non-responsive.
Non-returnable	May not be returned to the tenderer.
Procurement	Procurement is the process which creates, manages and fulfils contracts relating to the provision of goods, services and engineering and construction works or disposals, or any combination thereof.
Schedule A	Minimum requirements stipulated by the purchaser i.e., Eskom
Schedule B	Offered by the manufacture in response to purchaser's requirements
Standard	A document established by consensus to provide rules, limits, dimensions, tolerances or other characteristics for activities or their results, for common and repeated use. A standard is aimed at the achievement of the optimum degree of order in a given context. Compliance with a Standard is mandatory in its area of applicability
Standards Implementation	Is the department that is responsible for the implementation of standards and also for the equipment's Technology at an OU level.
Supplier	Means a current or potential Supplier, vendor, contractor, consultant, or service provider. Suppliers may include Tenderers that are the OEM or redistributors.
Tenderer	A manufacturer or supplier who wishes to bid on the listed tender.
Type test	It is defined as an element of conformity assessment, and also known as compliance testing, or type testing — is testing or other activities that determine whether a process, product, or service complies with the requirements of a specification, technical standard, contract, or regulation. They are done or when the raw material changes.

2.3.2 Disclosure classification

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

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2.4 Abbreviations

Abbreviation	Description
DT	Distribution technology
DWG	Drawing
IEC	International Electrotechnical Commission
ILAC	International Laboratories Accreditation Cooperation
NEC	New Engineering Contract
NRS	Compliance with NRS 047 Quality of Service
OEM	Original Equipment Manufacturer
RFQ	Request for Quotation
SANS	South African national standards
SAP	Systems Application Processes
SI	Standards Implementation
TET	Technical Evaluation Team

2.5 Roles and responsibilities

All the Eskom employees and/or appointed bodies involved in the technical tender evaluations of new SF6 Gas supplied in standard gas cylinders shall make use of this document, and reference 32-1034 and 240-48929482 when preparing the technical documentation for the commercial process, as well as during the execution of technical tender evaluations for these products.

2.6 Process for monitoring

This document is applicable to current initiatives related to the procurement of New SF6 Gas supplied in standard gas cylinders for Distribution networks. The document shall be monitored to ensure alignment with the documents as stated in the Normative References.

2.7 Related/supporting documents

None

3. TECHNICAL TENDER STRATEGY AND CRITERIA**3.1 Technical Tender Enquiry Strategy**

The tenderer shall receive the document pack and indicate which sap numbers are tendered for on the Material Consolidation. The evaluation criteria will be used to measure the supplier's ability to supply Eskom with new SF6 Gas supplied in standard gas cylinders for Distribution Systems in compliance with the specific requirements as stated in Eskom's Standards, Eskom's Buyer's Guide Documents, South African National Standards, International Standards (if there is no South African Standard available) and specific user stipulations, as included in the Commercial strategy. This will be achieved by conducting the desktop evaluation of a specified Enquiry Returnable

Suppliers who are tendering but are not the OEM of the product must source the required technical returnable from the OEM where relevant. Missing information will not be requested after the Enquiry closing date.

If any part or sub-component of the production process is outsourced, the Supplier shall retain full and complete accountability for the (entire) product.

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3.1.1 Technical Evaluation Team Strategy

The Technical Evaluation Team (as per 240-48929482) will evaluate the submissions. The submissions shall be subjected to a progressive series of evaluation levels. Passing of each level is a prerequisite for proceeding to the next evaluation level.

The evaluation levels are as follows:

- Level 1 Mandatory Requirements Evaluation
- Level 2 Functional (Scoring) Requirements Evaluation
- Level 3 Factory Assessment and Verification

Level 1 and Level 2 criteria will be evaluated independently by a minimum of 2 evaluators. Clear justification will be required for concluding that any criterion is not met. The independent results will be compared after both the Level 1 and Level 2 evaluations are completed. Differences in results or scoring between evaluators for criteria shall be normalised by the manager or any other neutral member as appointed by the manager.

The Level 3 Factory Assessment and Verification will require the Evaluation Team together with other required Eskom Stakeholders to inspect the production facility. The Factory Assessment and Verification shall be conducted as a team and a single assessment result will be produced.

The scope and criteria of the Level 3 Factory Assessment and Verification will be defined by the Technical Evaluation Team and the Eskom Assessment Representatives, prior to the assessment. The assessment checklist may be shared with the tendering company prior to the assessment. The Level 3 threshold is 80.00%. The Level 3 result will represent the final result for the submission.

A final result per submission shall be determined and shall be stated as follows in the evaluation report:

- Non-compliant
- Compliant with qualifications
 - This means that there may be deficiencies that need to be addressed prior to contracting or procuring. The terms of this will be stated in the tender strategy document.
- Fully compliant

Full compliance to the technical standards included in the criteria is critical due to the high risk introduced by non-compliance.

3.1.2 Technical Tender Evaluation Strategy

The desktop evaluation will require the submission of evidence demonstrating compliance to the Mandatory Requirements. This will be known as the **Level 1 Mandatory Requirements**. This aspect of the desktop assessment determines if the requirement as set for the mandatory tender returnable has been met, by assessing if all the mandatory documentation is included in the submission. The content of the document is not scrutinized at this level. This level is a test of responsiveness.

- Submissions fully complying to the Level 1 requirements will proceed to the next level of the technical evaluation.
- Submissions failing to fully comply to Level 1 requirements will be deemed non-responsive (non-compliant); the submission will be disqualified and not evaluated further.

Table 1: Mandatory Requirements

All evidence stated below must be included in the tender returnable for the submission to be considered complete. All returns must be submitted at tender closing and cannot be requested or submitted after tender closing.			
No	Criteria	Mandatory	Returnable (Evidence)
1	Completed and signed Technical A&B Schedules for each SAP number stated on the enquiry.	Y	<p>Returnable: Completed and signed Technical A&B Schedules per SAP number</p> <p>Notes: The A&B Schedule documents will be provided by Eskom. Each SAP number will require the submission of its respective schedule. The SAP number must be stated on the schedule. Evidence for any other SAP number will not be accepted.</p> <p>This schedule is considered completed when the Supplier includes the product specific information into the Schedule B column for all criteria.</p> <p>Schedules will be considered incomplete if any criteria in Column B is returned blank or with non-technical responses such as "N/A", "TBD", "Will be submitted later" etc.</p> <p>Specific deviations to the Schedule A requirements are to be clearly stated in the Deviation Schedule with details related to the deviation and motivation for Eskom to consider a concession.</p>
2	Completed and signed Deviation Schedules for each SAP number per buyers guide drawing stated on the enquiry	Y	<p>Returnable: Completed and signed Deviation Schedules per SAP number</p> <p>Notes: The Deviation schedule shall be provided by Eskom. Each SAP number shall require the submission of its respective deviation schedule. The SAP number must be stated on the schedule. Evidence for any other SAP number will not be accepted.</p> <p>If no deviations exist then none need to be listed, however the evidence of the Deviation Schedule must still be signed and submitted with a "nil" record.</p> <p>Deviations stated on the Deviation Schedule may relate to deviations stated on the Technical A&B Schedule or deviations to the testing requirements stated in the Test Report Schedule.</p>

The desktop evaluation shall also require evidence demonstrating compliance to the Functional (Scoring) Requirements. This forms **Level 2 Functional (Scoring) Requirements**. This aspect of the desktop assessment determines the compliance of the submission to specific technical criteria, by evaluating the content of the technical tender returnable.

- The technical criteria set for Level 2 shall be allocated scores. Final scores shall be stated in percentage terms.
- The submissions are assumed to have a score of 0% prior to evaluation commencement. Positive marking will apply for compliance to the stipulated criteria i.e., marks shall be added from the starting score of 0% until a final Level 2 score is achieved for that submission. Table 2 below indicates the overview formation of the functional requirements and tables 3 and 4 below indicates the scoring methodology for Schedule A & B and Drawing.

Table 2: Functional Requirements

Item	Description	Weight Score
1	Schedule A and B	75%
3	Deviation Schedule	25%
Sum		100%

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Table 3: Schedule A & B Scoring Methodology

Item	Description	Weight Score
1	No deviations	100%
2	Less than 2 deviations	80%
3	Deviations are more than 2 and less than 5.	60%
4	Deviations are more than 5 and less than 7.	40%
5	Deviations are more 7	0%
Sum		100%

Table 4: Drawing Scoring Methodology

Item	Description	Weight Score
1	Revision number	16.6%
2	Drawing Number	16.6%
3	Manufactures Name	16.6%
4	Description	16.6%
5	Signed and Approved	16.6%
6	Detailed Assembly	16.6%
Sum		100%

The Level 2 The minimum threshold is **seventy-five (75%) percent** compliance of type tests. Compliance to the technical standards included in the criteria is critical, due to the high risk introduced by non-compliance.

Type Test Reports:

This criterion is evaluated in two parts. The evaluation must proceed in the correct sequence (i.e., A then B). Completeness of Testing Evidence Reports means:

- The full set of test reports as required by the Test Report Schedule issued by Eskom are submitted as evidence, and
- The test reports contain all relevant information as stated by this criterion.

3.1.2.1 The set of test reports is considered complete if:

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- a) All tests stated with Test Report Numbers in the Test Report Schedule have a corresponding test report contained in the submission, and
- b) Where any test is stated as "Not Available", the details related to the test requirement deviation and motivation are included on the Deviation Schedule and Eskom allows a concession for the testing requirements.

3.1.2.2 Test report content will be considered complete if the following is stated in the report:

- The test facility at which the test was conducted.
- The product that was tested
- The standards against which it was tested.
- The test name / details
- The test result / outcome
- Date of test / Date of report issue

•
All test reports must comply. Individual test reports per test requirement as well as consolidated test reports containing all the test results will be accepted.

- Submissions meeting **seventy-five (75%) percent** of the Level 2 requirements will be compliant and those failing to meet **seventy-five (75%) percent** of the Level 2 requirements will be deemed non-compliant.
- Where clarifications are required, the rules as per 32-1034 are to be applied and no tender is to be made responsive via the clarification process.

3.2 Technical Tender Criteria and Returnable

It is preferred that the technical returnable be contained within the technical section of the submission.

3.2.1 Technical Requirements

3.2.1.1 Technical Compliance Criteria

Products offered during the Commercial tender process and supplied to Eskom subsequent to the contract awarding process must comply with the latest revision all relevant standards.

The technical team shall provide a comprehensive listing of the relevant standards, in relation to the SAP items included in the scope of the Commercial enquiry. Refer to Annexure A for Schedule A&B to be completed and submitted by the tenderers.

3.2.1.2 Technical Tender Document Pack

The Technical Tender Documents must be consolidated and confirmed by the Technical Evaluation Team and will form part of the Enquiry Documentation. The Technical Tender Document Pack shall contain technical Schedule A & B as listed in Annexure A (as a minimum requirement). The tenderer must complete in full technical schedule A& B they wish to tender for.

SF6 gas shall be supplied in Class 1 steel cylinders, seamless metallic type in accordance with SANS 10019 standard. The seamless metallic type of gas cylinders shall be in line with Annexure B.

3.2.2 Concessions

The Technical Evaluation Team is to consult with the relevant Subject Matter Specialist when considering concessions of a significant nature. Concessions must state the terms of acceptance. Concessions that are awarded are to be documented in the technical evaluation report. Details of the concession must be included in the contract negotiations or award process.

Where clarifications with the Supplier are required, the rules as per 32-1034 are to be applied, and no tender is to be made responsive via the clarification process.

The details included to the technical requirement must include the following:

- Bidder name
- SAP number
- Deviation
- Statement of acceptance of the deviation
- Limits to the acceptance, if any
- Terms/Conditions of acceptance, if any

3.3 Technical Tender Documentation

The Criteria tables contained throughout section 3.2 shall be converted into evaluation sheets by the Technical Evaluation Team for the purpose of conducting the evaluations and for creating a record of the evaluation conducted per submission, per evaluator.

The Technical Evaluation Team shall provide Commercial with a formal report containing the details of the technical outcome of the evaluations.

As per the PCM, Provide Engineering during Project Sourcing, the report may contain the following content:

- Details on the implementation of Tender Technical Evaluation Strategy
- List all tenders (Supplier's name, etc.) received and evaluated.
- Summary of all clarification questions and responses received.
- Summary of evaluation results
- Clarifications related to the product sample evaluation scoring.
- Interpretation of evaluation results (mandatory and scoring criteria)
- Final conclusions and recommendations
- All individual scoring forms and consolidated results
- Minutes of all meetings during evaluation process (internal clarification sessions, Supplier clarification sessions, etc.)

The report must be signed and authorised by appropriate representatives.

3.4 Summary Table of Technical Tender Process

The following table provides a high-level overview of the process described in sections 3.1.2.1 and 3.1.2.2.

Table 5: Summary of Technical Tender Process

Level	Level Description	Threshold	Maximum Score	Minimum Score	Outcomes
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1	Mandatory Requirements	100%	Pass/Fail – no scoring	Pass/Fail – no scoring	<ul style="list-style-type: none">• Submissions meeting 100% - will proceed to the next level.• Submissions failing to meet 100% - deemed non-responsive; the submission will be disqualified and not evaluated further.
2	Functional Requirements	75%	100%	75%	<ul style="list-style-type: none">• Submissions meeting 75% - proceed to the next level of the technical evaluation.• Submissions failing to meet 75% - deemed non-compliant; the submission will be disqualified.

4. AUTHORIZATION

This document has been seen and accepted by:

Name and surname	Designation
Mmedi Motaung	SI Manager LOU
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5. REVISIONS

Date	Rev	Compiler	Remarks
July 2024	1	F Mthethwa	First issue document

6. DEVELOPMENT TEAM

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

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- Boreman Risiva
- Mmedi Motaung
- Malusi Mathonsi

7. ACKNOWLEDGEMENTS

- None

ANNEXURE A: TECHNICAL SCHEDULE A & B

Technical Schedule A & B spreadsheet will be submitted as part of these technical requirements.

ANNEXURE B: GAS CYLINDER TYPE



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