

Title: **TECHNICAL EVALUATION
CRITERIA FOR ESKOM
DISTRIBUTION SYSTEMS
HARDWARE FITTINGS,
EARTHING AND CABLE
ACCESSORIES**

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1. Introduction

This document establishes the standard technical evaluation criteria to be used when evaluating the submissions by prospective suppliers in response to formal Commercial Enquiries issued for various Eskom distribution systems hardware, cable accessories, earthing accessories and fittings used on networks within Eskom Distribution Limlanga Cluster.

This document details the technical strategy, method of evaluation and the evaluation criteria, which includes the Enquiry returnable necessary to conduct the desktop evaluation, the product sample evaluation and the requirements for the Factory Assessment and Verification.

There are numerous and varied Eskom Distribution systems hardware, cable accessories, earthing accessories and fittings items published on the Eskom Buyer's Guide drawings, each with unique standards and testing requirements. The intention of this document is to set-out the generic process to be complied with across the array of items that are the object of the formal open Enquiry, and the specific requirements shall be stated in the Technical Schedules related to the specified item.

2. Supporting clauses

2.1 Scope

This document encompasses the evaluation strategy and criteria for various items of Eskom Distribution Limlanga Cluster systems hardware, cable accessories, earthing accessories and fittings used on power networks within Eskom Distribution. 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 distribution systems hardware, cable accessories, earthing accessories and fittings used on networks within Eskom Distribution. 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. A Technical Tender Pack folder (with technical schedules) has been published along with this complete report. The Tender Pack Version is an extract of the tender strategy and criteria relevant to the market, excluding Eskom specific information relevant to the Cross Functional Team and Technical Evaluation Team. The tender pack version is to be included to the tender documents, and not this full report.

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 for Eskom Distribution Limlanga Cluster systems hardware, cable accessories, earthing accessories and fittings 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 distribution hardware and fittings. This document is not applicable if a Technical Evaluation Criteria document has been published by the relevant Technology Centre of Excellence for components included to the Commercial process scope.

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: 2015, Quality Management Systems.
- [2] 32-1034 - Eskom Procurement and Supply Chain Management Procedure

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- [3] 240-48929482 rev 1 - Tender Engineering Evaluation Procedure
- [4] 240-51757553 - Provide Engineering during Project Sourcing
- [5] SANS IEC 61284 - Overhead lines - Requirements and tests for fittings
- [6] 240-75883154 - Current Carrying Compression Fittings for Overhead Sub-Transmission Systems
- [7] D-DT 2000 series, 3000 series, 6000 series, 7000 series and 8000 series
- [8] 240-170001064 - Governance Rules and Processes for Managing the Technically Evaluated and Accepted Products (TEAP) Database in Eskom Distribution
- [9] 240-170001065 - Work Instruction for Updating the Technically Evaluated and Accepted Products (TEAP) Database in Eskom Distribution

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.
Eskom Distribution Systems Hardware, cable accessories, earthing accessories and fittings	Hardware components and assemblies used for the construction of power systems and substations.
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

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Definition	Description
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 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 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).

2.4 Abbreviations

Abbreviation	Description
DT	Distribution technology
DTI	Department of Trade and Industry
DWG	Drawing
IEC	International Electrotechnical Commission
ILAC	International Laboratories Accreditation Cooperation
MPa	Mega Pascal
NEC	New Engineering Contract
NRS	Compliance with National Rationalised Specification 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
TEAP	Technically Evaluated and Accepted Products

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Abbreviation	Description
OEM	Original Equipment Manufacture

2.5 Roles and responsibilities

Tenderer

All the Eskom employees and/or appointed bodies involved in the technical tender evaluations for Eskom Distribution systems hardware, cable accessories, earthing accessories and fittings 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 Eskom Distribution systems hardware, cable accessories, earthing accessories and fittings 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 Eskom Distribution systems hardware, cable accessories, earthing accessories and fittings 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 and a product sample evaluation. In addition, if it may be deemed necessary by the technical evaluation team to undertake a Factory Assessment and Verification to review the production plant wherein the items are manufactured, the tenderer will be informed.

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.

Note 1: Eskom Distribution systems hardware items are allocated a specific designation by the Department of Trade and Industry (DTI) which is included in the Commercial section of the enquiry. The technical evaluation process shall only proceed when the DTI designation requirements are met.

Note 2: The Cross Functional Team is required to consider, per item included in the scope, the options of sourcing from the OEMs only, or if Suppliers are sourcing from redistributors may be considered with the manufacture clearly stated on schedule A and B and this requirement must be clearly stated in the Commercial Strategy documentation.

3.1.1 Technically Evaluated and Accepted Products List

To give effect to the TEAP database and to manage the market, the following clauses will be included as part of the technical requirements:

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- Eskom reserves the right not to perform a technical/functional evaluation on a product that has been added to the product database as this product has previously been found to be technically compliant. However, if the OEM has changed the design or the raw material of the previously technically approved and accepted products by Eskom, then they will be evaluated as per the technical evaluation criteria.
- The TEAP database will contain information that describes the technically accepted products. To provide a complete description of the product, the OEM's names will also be included. Eskom will not be obligated to purchase from the OEM. The relevant Eskom procurement process will be used to procure products – thus the details of the listed products cannot form part of the enquiry documents that go to the market.
- The procurement process does not prevent tenderers submitting products that are not listed. If products that are not listed are submitted, the products will form part of the tender. It will be technically evaluated and listed if it complies with Eskom's technical requirements.
- The functional scoring threshold will be used as an entry requirement to the database. The entry of a product to the database is determined by compliance with Eskom's technical requirements. This compliance is determined by a technical evaluation that gets conducted during the tender process. Accepted products will be listed irrespective of the tenderer winning the tender or not. Eskom reserves the right to place the technically compliant products on the product database upon it meeting the threshold set for technical/functional evaluation.
- Eskom reserves the right not to perform a technical/functional evaluation on a product that has been added to the product database as this product has previously been found to be technically compliant.
- The management of the TEAP will be in accordance with documents [8] and [9].

3.1.2 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 Technical Criteria Evaluation
- Level 2 Functional (Scoring) Criteria Evaluation
- Level 3 Sample Criteria Evaluation
- Level 4 Factory Assessment and Verification (where applicable)

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 clarified by the Technical Evaluation Team in order to reach consensus on the specific disparities identified. Consensus shall be reached in accordance with clause 3.4.2.3 of Procedure 240-48929482. The outcome of each Level will determine if the submissions proceed to the next level for evaluation.

If the submission proceeds, the Level 3 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 the Level 3 evaluations are completed. Differences in scoring between evaluators for criteria shall be clarified by the Technical Evaluation Team in order to reach consensus on the specific disparities identified. The final outcome will determine if the submissions proceed to the Level 4 Factory Assessment.

The Level 4 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.

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3.1.3 Technical Tender Evaluation Strategy

The desktop evaluation will require the submission of evidence demonstrating compliance to the Mandatory Technical Criteria. This will be known as the **Level 1 Mandatory Criteria**. 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 of the Level 1 requirements will be deemed non-responsive (non-compliant); the submission will be disqualified and not evaluated further.

Table 1: Mandatory Technical Returnable

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	Complete and approved (signed) Manufacturer Drawings for each SAP number stated on the enquiry	Y	<p>Returnable: Completed and approved (signed) Manufacturer Drawings per SAP number with:</p> <ul style="list-style-type: none"> • Revision number • Drawing Number • Manufactures Name • Description • Signed and Approved • Detailed Assembly <p>Notes: The drawings must be provided for each unique SAP number. The SAP number may be stated on the drawing, or the document title can describe the product. The drawings must have the Manufacturer's name included.</p> <p>"Approved" means there is an approval signature on the drawing. Evidence for any other SAP number will not be accepted.</p>
3	Completed and signed Test Report Schedules for each buyers guide drawing	Y	<p>Returnable: Completed and signed Test Report Schedules per SAP number</p> <p>Notes: The Test Schedule Template will be provided by Eskom. Each SAP number will require the submission of its respective test schedule. The SAP number is stated on the schedule. Evidence for any other SAP number will not be accepted.</p>

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			<p>Test Schedules will be considered incomplete if any test report number is left blank. If the test report is not available (e.g., the specific test has not been executed on the specific product) then state "Not Available".</p> <p>Where "Not Available" is stated, this deviation (per test) is to be clearly stated in the Deviation Schedule with details related to the deviation and motivation for Eskom to consider a concession for the testing requirements.</p>
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- 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.

The desktop evaluation shall also require evidence demonstrating compliance to the Functional (Scoring) Technical Criteria. This forms **Level 2 Functional (Scoring) Criteria**. 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: Schedule A and B scoring methodology per Sap Number

Item	Description	Weight Score
1.	No discrepancies i.e., fully completed	100%
2.	Less than 2 discrepancies	80%
3.	Discrepancies are more than 2 and less than 5.	60%
4.	Discrepancies are more than 5 and less than 7.	40%
5.	Discrepancies are more than 7	0%
Sum		100%

Table 3: Summary of Evaluation Results per Sap Number

Item	Description	Weight Score
1.	Deviation schedule	25%
2.	Schedule A and B	75%
Sum		100%

The Level 2 Threshold is 90.00% with 100% compliance of type tests. Compliance to the technical standards included in the criteria is critical, due to the high risk introduced by non-compliance. Eskom Distribution systems hardware items are considered high risk items, meaning that when component failure occurs, serious harm, injury or death may be caused to the public, animals, or the environment. It also places the network at risk and could adversely affect both the performance as well as continuity of supply.

Requirements for acceptance:

This criterion is evaluated in two parts. The evaluation must proceed in the correct sequence (i.e., 3.1 then 3.2).

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 The set of test reports is considered complete if:

All tests stated with Test Report Numbers in the Test Report Schedule have a corresponding test report contained in the submission,

AND

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.

3.2. 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 90.00% of the Level 2 requirements will proceed to the next level of the technical evaluation.
- Submissions failing to meet 90.00% of the Level 2 requirements will be deemed non-compliant; the submission will be disqualified and not evaluated further.
- 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.

The Product Sample Criteria will be known as the **Level 3 Sample Criteria**.

The product sample assessment shall be undertaken per manufacture and deemed acceptable or not for all suppliers, only if the Level 2 threshold is met. The non-returnable sample will be requested by the responsible Buyer after Level 2 requirements are met. For those samples that are deemed by the Evaluation Team to be unduly large for delivery to the respective Eskom offices where the evaluation is being conducted, the Technical Evaluation Team may opt to perform the sample evaluation at the manufacturing plant. All other smaller samples shall be delivered to the Designated Eskom Commercial office responsible for that particular product within 14 calendar days from the date of request. The inclusion of a 14-waiting period for samples needs to be included in the tender validity period and the evaluation timeline.

The sample evaluation determines the compliance of the manufactured product to the manufacturing standards as stated in the Level 2 criteria. As an example, the product sample will be assessed for compliance to aspects such as dimensions, galvanising, markings, accessories etc. These will be known and sourced from the measurable criteria stated in the Level 2 criteria. No new criteria will be introduced at this stage.

- The Level 3 Threshold is 100% (with consideration of the points raised below). Full compliance to the technical standards included in the criteria is critical due to the high risk introduced by non-compliance. Eskom Distribution systems hardware items are considered high risk items, meaning that when component failure occurs, serious harm, injury or death may be caused to the, public, animals or the environment. It also places the network at risk and could adversely affect both the performance as well as continuity of supply.
 - If the Level 2 scoring is less than 100%, but meets the Level 2 threshold requirement, the following approach shall be adopted with the sample assessment:
 - The deviations that will impact the sample assessment must be noted and must be formally recorded in the final technical report.
 - The sample assessment must allow for the noted deviations. Points may not be deducted again for deviations accepted in the Level 2 evaluation. This will be recorded in the evaluation report as a clarification.
 - Should the submission be deemed successful at the conclusion of the Commercial process, the manufacturer of the product shall be notified of the deficiencies and shall be requested to undertake corrective action within a reasonably stipulated time. Thereafter the supplier is required to demonstrate the corrective action undertaken to Eskom as a condition of the product being considered acceptable for procurement.

Note 3: The Cross Functional Team is required to determine the reasonably stipulated time, and should the corrective action not be met within the stipulated timeframe, the resultant outcome of the technical evaluation shall be announced. Refer to clause 3.2.6

- Submissions meeting 100% of the Level 3 requirements shall proceed to the next level of the technical evaluation.
- Submissions failing to meet 100% of the Level 3 requirements shall be deemed non-compliant; the submission shall be disqualified and not evaluated further.
- 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.

Submissions satisfying the Level 3 requirements shall be considered for the Level 4 Factory Assessment and Verification. The Technical Evaluation Team and Eskom Assessment Representatives shall determine if a Factory Assessment and Verification is required. If the Factory Assessment and Verification is not required, then the evaluation may be concluded with the Level 3 result.

If the manufacturer has supplied Eskom with Distribution Systems Hardware, cable accessories, earthing accessories and fittings for a period of 5 years or more, or has affected a factory change, a design change, a change in manufacturing or testing, then the respective technical evaluation team shall decide at their discretion whether or not to undertake a Factory Assessment and Verification. If a manufacturer has not previously supplied Eskom with Distribution Systems Hardware and Fittings, such a manufacturer shall be subjected to a Factory Assessment and Verification. Factory Assessment and Verifications shall only be undertaken with OEM's that have tendered or the OEMs for products offered by Redistributors, but not with the Redistributors themselves.

The scope and criteria of the Level 4 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 4 threshold is 80.00%. The Level 4 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

Note 4: The Cross Functional Team is required to determine the reasonably stipulated time, and should the corrective action not be met within the stipulated timeframe, the resultant outcome of the technical evaluation shall be announced. Refer to clause 3.2.6

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.

3.2.1.2 Inclusion of Technical Requirements to the NEC

The Technical Evaluation Team may provide input into the technical clauses of the NEC document specific to the Commercial enquiry, if so required. The Technical Evaluation Team shall advise the Cross Functional Team and Buyer if technical standards or operational requirements may potentially influence contracting requirements (e.g., Design Reviews post tender award, design changes during the contracting period, restrictions, allowances due to concessions issued during tender evaluations, or engineering and design management meetings).

3.2.2 Level 3 Sample Criteria Evaluation

This evaluation will be conducted per SAP number. A sample will be evaluated as follows:

Table 4: Level 3 Sample Criteria

Compliance to Measurable Technical Standards			
No	Criteria	Maximum Score	Scoring Method
1	Compliance of the Manufactured product to the measurable standards included in the Technical A&B Schedules and the Manufacturer’s drawings included in the submission.	5	5 – Fully Compliant 0 – Deficient or non-responsive
<p>The specific requirements for the purpose of the evaluation will be sourced from the Technical A&B Schedules and Manufacturer’s Drawings per SAP number.</p> <p>Positive marking will be applied as follows:</p> <ul style="list-style-type: none"> 5 points will be awarded for fully compliant submissions. Fully compliant means no deviations from the specified criteria were identified. 0 points will be awarded if the sample is non-compliant. 			

The Level 3 Threshold is 100%. Full compliance to the technical standards included in the criteria is critical due to the high risk introduced by non-compliance.

- Submissions meeting 100% of the Level 3 requirements will proceed to the next level of the technical evaluation i.e., the Factory Assessment and Verification or the evaluation will be concluded at this stage as per the decision from the Technical Evaluation Team.
- Submissions failing to meet 100% of the Level 3 requirements will be deemed non-compliant; the submission will be disqualified and not evaluated further.

3.2.3 Level 4 Factory Assessment and Verification Criteria

The Factory Assessment and Verification is a major milestone in the assessment of Eskom Distribution systems hardware material manufacture and supply where the production facility demonstrates that the product design and manufacturing processes meet Eskom’s product standards (derived from the functional requirements as specified in the Technical Schedules).

The Factory Assessment and Verification aims to review a design, production and testing facility’s quality systems, workplace environment and capabilities to manufacture Eskom Distribution systems hardware materials as required by Eskom. It ensures that the manufacturers can process orders as per Eskom’s requirements.

The Factory Assessment and Verification provides assurance that the manufacturer has the design and manufacturing capability to produce a product according to normative requirements specified. It also provides assurance that the manufacturer can deliver quality products, undertake continuous improvements, and operate efficiently. The Factory Assessment and Verification provides insight and confidence on a manufacturer’s structure, organisation, quality process and experience in possessing the capability to process Eskom’s orders.

The Factory Assessment and Verification shall include a review of the following factors:

- Demonstrate that there are good manufacturing practices (factory production technology) established, to assess the degree of automation, sophistication and precision of the production assets installed to produce the required products in a high-volume operation i.e., is the production more reliant on manual methods or fully automated processes.
- There are technical work instructions and supporting technical documents in place ensuring that every product adheres to the required standards, also ensuring that technical changes are controlled and managed from design to manufacturing and ensuring consistency and repeatability in the production process.
- There is a product control system in place ensuring testing of raw material and testing (sample and routine) of finished products, ensuring compliance to Eskom standards, and such test certification is retained in archives and available for inspection.

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- d) That production personnel are competent and imbued with the necessary skills by means of certification and specialised training (certificates from approved authority and skills training certificates), demonstrate the technical capability of design and production personnel.

Table 5: Level 4 Factory Assessment and Verification Criteria

Compliance to Factory Assessment and Verification Criteria			
No	Criteria	Maximum Score	Scoring Method
1	Compliance to Factory Assessment and Verification Criteria	5	5 – Fully Compliant 4 – Compliant with qualifications 2 – non-Compliant 0 – Deficient or non-responsive
<p>The specific requirements for the purpose of the evaluation will be sourced from the Factory Assessment and Verification checklist prepared by the Factory Evaluation Team.</p> <p>Positive marking will be applied as follows:</p> <ul style="list-style-type: none"> 5 points will be awarded for fully compliant production facilities. Fully compliant means no deviations from the factory evaluation criteria were identified. 4 points will be awarded if the production facility demonstrates compliance to defined criteria however there are deficiencies that are considered by the Factory Evaluation Team to be low risk criteria. 2 points will be awarded if the production facility demonstrates deviations to most criteria. 0 points will be awarded if the production facility is completely non-compliant or declines to participate in the Factory Assessment and Verification. 			

The Level 4 Threshold is 80.00%.

- Submissions meeting 80.00% of the Level 4 requirements will be awarded a result of Fully Compliant or Compliant with Qualifications, as determined by the Technical Evaluation Team.
- Submissions failing to meet 80.00% of the Level 4 requirements will be deemed non-compliant; the submission will be awarded a result of non-compliant.

3.2.4 Contractual Requirements

As per 32-1034, contractual requirements are not evaluation criteria, but these requirements must be met prior to the contract award to the highest ranked supplier.

Deficiencies identified during the tender evaluation (level 2 and 3) or Factory Assessment and Verification Criteria (level 4) as discussed in clause 3.1.2 and note 4 and note 5, must be addressed prior to contracting with the highest ranked supplier. The contractual requirements are to be discussed with the Cross Functional Team and included to the commercial strategy, clearly stating that identified deficiencies are to be addressed within a stipulated timeframe, prior to contract award. If the requirements are not satisfied, supplier will not be awarded on the contract.

3.2.5 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

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

3.2.6 Addendums to the Technical Evaluation Criteria

The Technical Evaluation Team may consider minor modifications to the technical criteria as stated in this document. The modifications may be motivated by the scope of the Commercial enquiry (i.e. range of SAP numbers), technical compliance matters related to the scope, engineering instructions pertinent to the scope of the enquiry or with guidance from the Subject Matter Specialist, Addendums are to be formally recorded (see Annex A for a sample template), signed by the Technical Evaluation Team and additional approvers and must be included to the Technical Tender Documentation Pack (as per **Error! Reference source not found.**). The template/format may be adjusted as required.

Addendums must be included to the tender pack prior to the issuing of the tender. If there is a need to issue an addendum during the period that the tender is open to the market, this must be done in consultation with the Buyer and only with approval from the requisite Governing Authority. Procedural requirements of 34-1034 (latest revision) must be adhered to in this case.

No addendums may be issued once the tender is closed.

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 and 3.2.

Table 6: Summary of Technical Tender Process

Level	Level Description	Threshold	Maximum Score	Minimum Score	Outcomes
1	Mandatory (Gatekeeper) Criteria	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 (Scoring) Criteria	90.00%	100%	90.00%	<ul style="list-style-type: none"> Submissions meeting 90.00% - proceed to the next level of the technical evaluation. Submissions failing to meet 90.00% - deemed non-compliant; the submission will be disqualified and not evaluated further.
3	Sample Evaluation Criteria	100%	5	5	<p>The Level 3 Threshold is 100%. Full compliance to the technical standards included in the criteria is critical due to the high risk introduced by non-compliance.</p> <ul style="list-style-type: none"> Submissions meeting 100% - proceed to the next level of the technical evaluation i.e. the Factory Assessment and Verification or the evaluation will be concluded at this stage as per the decision from the Technical Evaluation Team. Submissions failing to meet 100% - deemed non-compliant; the submission will be disqualified and not evaluated further.
4	Factory Assessment and Verification Criteria	80.00%	5	4	<ul style="list-style-type: none"> Submissions meeting 80.00% of the Level 4 requirements will be awarded a result of Fully Compliant or Compliant with Qualifications, as determined by the Technical Evaluation Team. Submissions failing to meet 80.00% of the Level 4 requirements will be deemed non-compliant; the submission will be awarded a result of non-compliant.

4. Authorization

This document has been seen and accepted by:

Name and surname	Designation
Mmedi Motaung	SI Manager LOU
Pravind Orrie	Asset Creation Manager

5. Revisions

Date	Rev	Compiler	Remarks
Sep 2021	1	M Mathonsi	First issue document
Sept 2024	2	F Mthethwa	Revision due to tender re-issue

6. Development team

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

- Decky Shabangu
- Boreman Risiva
- Mmedi Motaung
- Malusi Mathonsi
- Fundiswa Mthethwa

7. Acknowledgements

- Standard Implementation Senior Engineer, Shabnum Behari for some content of 240-143804436

Annex A – Addendums to the Technical Evaluation Criteria (example)

Tender Enquiry Number:

IMPORTANT NOTE:

This document must be read in conjunction with 240-143804436 (Technical Evaluation Criteria for Eskom Distribution Systems Hardware and Fittings) for the full technical approach and criteria.

This addendum is applicable to the **material master file** SAP numbers included on the scope of the enquiry and it will be evaluated as follows:

Material Group	Buyers Guide Drawing	SAP Numbers	Description
1			
2			
3			

Approval (Technical Evaluation Team):

NAME	DESIGNATION	SIGNATURE	DATE

Document Classification: Confidential

**TECHNICAL EVALUATION CRITERIA FOR ESKOM
DISTRIBUTION SYSTEMS HARDWARE FITTINGS,
EARTHING AND CABLE ACCESSORIES**

Unique Identifier: **SILC-735**

Revision: **2**

Page: **19 of 19**

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