

Eskom Dx - Technology and Engineering

Reliability Services Aggregator Programme (RSAP) Mandatory Requirements Guideline and RSAP Technical Evaluation Guideline.

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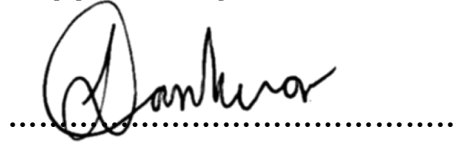


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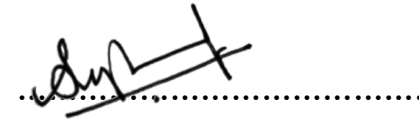


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1. RSAP Mandatory Requirements Guideline

	Item	Description of Mandatory Requirement	Returnable	Minimum Criteria Acceptance
1	Demonstrated Reliability Service (RS) programme and / or Reliability Service Project Management experience	<p>Experience is required across the full RS value chains either locally or internationally, summarised at high level as:</p> <ul style="list-style-type: none"> • Aggregation and integration of RS loads • Enrolling RS Participants, • Bidding, scheduling and dispatch in conjunction with the System Operator • Measurement, verification and performance management • Calculated monthly financial settlements 	<ul style="list-style-type: none"> • Details of current experience in each of the mentioned element of the value chain (as a minimum) • References/contracts which Eskom may consult. Reference/contracts must contain contract duration, number of load providers. 	Minimum 2 years' experience in conducting and management of RS programmes either locally or internationally comprising a minimum of 100 MW aggregated load
2	Reliability Services Aggregator System (RSAS) - Software system	An operational software system / platform for enrolling, bidding scheduling, dispatching, metering, performance and settlement calculations and integration.	<ul style="list-style-type: none"> • Details of the software system specification and communication/integration protocols. • Include references which Eskom may consult. • Provide confirmation of your hosting location. 	<ul style="list-style-type: none"> • Proof of ability to manage the mentioned volumes and diversity of participants. • All Eskom Data must be hosted within the borders of South Africa.
3	Reliability Services Aggregator Programme (RSAP)	<p>The Tender shall have a local presence in South African, office for support of RSAP, including RSAS, RSDC and RSI.</p> <p>Advanced-level support shall be available for all tendered products for the duration of the contract locally in South Africa.</p>	<p>A declaration of compliance letter to the requirements and adequate documentation to support the declaration.</p> <p>A declaration of compliance letter alone is not sufficient without supporting documents. Supporting documentation must be provided.</p>	Declaration of compliance letter submitted (declaring that the vendor meets this requirement) and the vendor did supply supporting documentation to support the declaration letter.
4	RSAP Solution	<p>Submissions include offers for all scheme/product types and variants.</p> <p>NOTE: This requirement shall be met only if tender submissions include offers for all products and all main product variants. Further, sufficient detail shall have been provided to allow for Eskom to perform a technical evaluation of the proposal.</p>	A declaration of compliance to the requirement, as well as a short description of the proposed solution with all the products/systems which form part of the proposal.	Declaration of compliance letter submitted (declaring that the vendor meets this requirement) and the submission shall include offers for all scheme/product types and variants.

5	RS Installation	The IED/s used as part of the RS Installation shall be substation hardened in that it shall have no fans and no rotating disk drives.	<p>A declaration of compliance letter to the requirement and product documentation (manuals, specs, etc) for the IED/s to be used in the RS Installation.</p> <p>A declaration of compliance letter alone is not sufficient without supporting documents. Supporting documentation must be provided.</p>	Declaration of compliance letter submitted (declaring that the vendor meets this requirement) and the vendor did supply supporting documentation to support the declaration letter.
6	Demonstrated RS programme and / or RS Project Management experience	Tenderers shall have a permanent South African office with a minimum 3-year track record for supply and support of control and/or substation automation components to the South African electric power utility industry. Advanced-level support shall be available from the South African office on all tendered products for the duration of the contract.	<p>A declaration of compliance letter to the requirements and adequate documentation to support the declaration.</p> <p>A declaration of compliance letter alone is not sufficient without supporting documents. Supporting documentation must be provided.</p>	Declaration of compliance letter submitted (declaring that the vendor meets this requirement) and the vendor did supply supporting documentation to support the declaration letter.
7	RS Data Collector and RS Installation	Solutions shall be assembled, configured and tested within the Republic of South Africa. IEDs and related electrical components may be imported, but panel work and wiring shall be done locally.	<p>A declaration of compliance letter to the requirements and adequate documentation to support the declaration.</p> <p>A declaration of compliance letter alone is not sufficient without supporting documents. Supporting documentation must be provided.</p>	Declaration of compliance letter submitted (declaring that the vendor meets this requirement) and the vendor did supply supporting documentation to support the declaration letter.

2. Technical Evaluation Guideline – RSAP

This section details the methodology to be employed by Eskom in scoring the technical category. This guideline is to be read with reference to RSAP Technical Schedules.

Contractors which pass the Mandatory Requirements shall be adjudicated a score out of 100%, made up of scoring in two sub-categories as seen in Table 1.

Table 1: Technical Categories

Technical subcategory	Sub-category name	Weight
1	Product A&B Schedules	90%
2	Product Demonstration	10%

The pass threshold for the Technical Evaluation shall be 80%.

2.1 Product AB Schedules - Technical subcategory 1

This section shall comprise scoring of the technical schedules of the systems and products. Not all items will be scored so as to maintain the focus of the evaluation on critical functionality.

Each line item in the **Technical subcategory 1: Product A&B Schedules** is assigned a percentage weight with all line items comprising the 100% for that sub-system or product. Critical items hold a greater weight compared to less important items. Each item will be assigned a score by the Eskom technical evaluation team based upon the tendered response and cross-checked with the supporting documents provided.

Table 2: Scoring of items in Technical A&B Schedules

Criteria	Score
Fully compliant	4
Compliant with development	2
Partially compliant (minor deviation)	1
Non-compliant (major deviation)	0

The score for each item will be multiplied by its weight to obtain the total score per section. The percentage weight of each section of the specifications/scope documents are indicated within the individual A&B schedules. All scores for the A&B Schedules will be tallied to obtain an overall score for that sub-system.

The **Technical subcategory 1: Product A&B Schedules** shall be further divided into two sub-systems, each of which shall be an adjudicated score out of 100%. The **Technical subcategory 1: Product A&B Schedules** scoring shall be made up of the two sub-categories as seen in Table 3.

Table 3: Technical subcategory 1: Product A&B Schedules

A&B Schedule subcategory	Sub-category name	Weight
1	Reliability Service Aggregator System	50%
2	Reliability Service Data Collector and RS Installation	50%

These subsections add up to 100% of the **Technical Sub-category 1: Product A&B Schedules**.

2.1.1 Reliability Service Aggregator System (RSAS)

The RSAS functional requirements are weighted at 50% of the overall technical score for the A&B Schedule. These requirements are divided into subsections with individual weightings.

These subsections add up to 100% of the RSAS Section.

Table 4: Reliability Service Aggregator System (RSAS) clause weighting

Clause	Description	Weight %
8.3	Enrolling RS participant	5.0%
8.4	Bidding	10.0%
8.5	Scheduling	10.0%
8.6	Dispatch	10.0%
8.7	Metering	10.0%
8.8	Reporting	10.0%
8.2	Administration	5.0%
21	Service Requirement	10%
AR	Architecture	10%
SE	Security	10%
IT	Integration and Testing	5%
MSC	Managed Services / Cloud	5%

2.1.2 RS Data Collector and RS Installations

The Reliability Service Data Collector and RS Installation functional requirements are weighted at 50% of the overall technical score for the Technical subcategory 1: Product A&B Schedules. These requirements are divided into subsections with individual weightings. The subsection weightings are listed below:

Table 5: RS Data Collector and RS Installation clause weighting

Clause	Description	Weight %
3	Solution Architecture Requirements	8.0%
4	Reliability Services Installation Solution Requirements for IDR	10.0%
5	Reliability Services Installation Solution Requirements for SDR	10.0%
6	Reliability Services Installation Solution Requirements for FFR	10.0%
7	Reliability Services Installation Solution Requirements for TFR and SFR	10.0%
8	Data Collector Solution Requirements for IDR	6.0%
9	Data Collector Solution Requirements for SDR	6.0%
10	Data Collector Solution Requirements for FFR	6.0%
11	Data Collector Solution Requirements for TFR and SFR	6.0%
12	Data Collector Requirements for the System Operator interface	6.0%
13	Data Collector - Hardware Requirements	5.0%
14	Data Collector - Software Requirements	2.0%
15	Reliability Services Installation - Hardware Requirements	10.0%
14	Reliability Services Installation – Software Requirements	5.0%

2.2 Product demonstration - Technical subcategory 2

This section shall be scored by the technical evaluation team following a half day demonstration at a selected Eskom site in Johannesburg or at the Contractor's premises (limited to Johannesburg/Pretoria area). Contractors shall be advised of their qualification for the demonstration, the exact date and time of the demonstration will be communicated two weeks prior to the demonstration. Only the RSAS portion of the solution are required to be demonstrated by the Contractors. The demonstration shall be assigned a score by the Eskom Technical evaluation team as detailed below.

Table 6: Demonstration Scoring Criteria

Scoring	Percentage
Fully Compliant	100%
Very High Compliance	80%
High Compliance	60%
Medium Compliance	40%
Low Compliance	20%
Not Compliant	0%

During the demonstration, the Contractor will be required to demonstrate the RSAS functionality against the RSAS scope as described in the Functional Scope of Work document (see Appendix A for the demo criteria) and will be able to use their proprietary tools. The Contractor shall also supply all equipment (including simulators) to successfully complete the demonstration items required. Eskom shall not supply any equipment. In addition to the demonstration items, the Contractor has the option to include a supplementary presentation on their proposed solution. This presentation should not exceed 20min.

3. Determination of Contractors who have met the threshold

Once all Contractors have been evaluated the following formula will be applied to determine which Contractors have surpassed the 80% threshold and therefore progress to the further stages of evaluation:

OVERALL TECHNICAL SCORE

$$= 0.90 \times (0.5 \times \text{RSAS AB schedule} + \text{Data Collector and RS Installation}) + 0.10 \times \text{RSAS Demo}$$

4. Tender submission guidelines (Technical)

These guidelines have been developed to aid in the tender evaluation process for both Contractors and the Eskom evaluation team. It is strongly encouraged for Contractors to comply with the following set of guidelines:

- a) Detail all answers sufficiently to give the Eskom evaluation team a clear understanding of the answer. Unclear and insufficiently detailed answers could result in items being ambiguous and misinterpreted and could result in an unfavourable score.
- b) Where a requirement asks for compliance, please respond with only one of the following:
 - 1) **Comply** – this indicates full compliance to the requirement at time of tender submission
 - 2) **Compliant with development** – this indicates that this requirement is not currently supported but shall be developed, tested, and implemented before the completion of the first site [approximately 6 months after enquiry issue date]. The Contractor shall provide a roadmap detailing the development milestones to become fully compliant.
 - 3) **Partially comply** – this indicates that the Contractor only complies with some of the requirements in the clause.
 - 4) **Non-comply** – this indicates that the requirement is currently not supported

and will not be available.

- c) Where indicated in the A&B schedule, the Contractor **MUST** provide valid references to supporting documentation. **Responses that have no valid references will be scored as a non-comply. The reference should include the sentence of phrase which is being referenced.**
- d) Arrange the folders and subfolders into a well organised and structured hierarchy making them logical and sensible to navigate.
- e) Name the files that constitute the electronic returnables appropriately based on the content of the document or file.
- f) Have returnable digital PDF documents searchable as far as possible. This is preferred to scanned documents that cannot be searched.
- g) Have returnable digital PDF documents include a table of contents as far as possible.

5. Appendix A – RSAS Demonstration Criteria

Listed in Table 7 are the mandatory tasks/items which must be demonstrated by the Contractors who have qualified for the demos. The Eskom technical evaluation team may ask for additional items to be demonstrated and/or explained on the day to determine a risk value of the product against the intended solution vision and integration to the rest of the solution.

Table 7: RSAS Demonstration Tasks

No.	Demonstration Tasks	Weighting %
8.3	Enrolling Participant	
8.3.1	Enrol participant	5%
8.3.2	Verify and capture Metering Data	5%
8.3.3	Perform Certification Test	5%
8.4	Bidding	
8.4.1	Submit participant bids	10%
8.4.2	Aggregate Participant bids	5%
8.5	Scheduling	
8.5.1	Receive aggregated Schedule from SO	5%
8.5.3	Schedule participant	5%
8.6	Dispatching	
8.6.3	Dispatch participants	10%
8.7	Metering data	
8.7.1	Retrieve metering data	5%
8.8.1	Performance reporting	
8.8.1.1	Event Performance Reporting - Calculate Participant Settlement based on consolidate monthly events, product criteria and approved rates	10%
8.8.2.3	Monthly Performance Reporting - Generate and verify Monthly Performance report	5%
8.8.2	Monthly Settlement Report	
8.9.1.2	Participant Settlements - Generate and verify Participant Settlement Report	10%
8.9.2.1 / 8.9.2.2	Consolidated Settlements - Generate and verify consolidated settlements into a monthly report based on criteria.	5%
8.8.3	Statistical reporting	
8.10.1	Provision of Statistical, System Operator and other reports in graphical and/or tabular formats.	5%
8.10.3	End-user creation of own reports for analysis purposes.	10%