

Title: **TECHNICAL EVALUATION
CRITERIA FOR THE EXPEDITED
TRANSMISSION &
DISTRIBUTION SOURCING OF
TRANSFORMERS**

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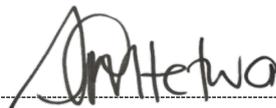
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Executive Summary

The technical tender evaluation is one of the critical gates in the enquiry chain to ensure that the bidders understand the customer's requirements and they are capable of designing, manufacturing, testing at works, prepare for shipment, transport, erect on site, commission the equipment, and can offer the required after sales technical support services. This tender technical evaluation criterion was created to evaluate all tenders for transformers and reactors, excluding those of class 0, which are already covered by document 240-77155912.

Compliance with this document will ensure that all suppliers bidding to supply transformers and reactors to Eskom are evaluated fairly and transparently. It minimises the influence of an individual discretion of a person doing the evaluation. The assessment of each supplier will be based on the information the supplier provided during the tender stage and on the factory assessment.

It is important that each bidder clearly provides and references/index all the necessary information required in the technical schedules AB and Annexures of this document.

1. Introduction

This scoring criterion shall be used in conjunction with the power transformer and reactor specification documents referenced in 2.2.1 below, to ensure that all the suppliers are scored on the same basis and in a transparent manner. This document details the method of evaluating based on

- The tender returnable are – **completely filled Schedule AB**. It is acceptable to submit a record of an already approved design if the intention is to bid with the same design.

The document shall be used for all transformers of class 1 and above as indicated in figure 1 below, and on all the oil immersed shunt reactors.

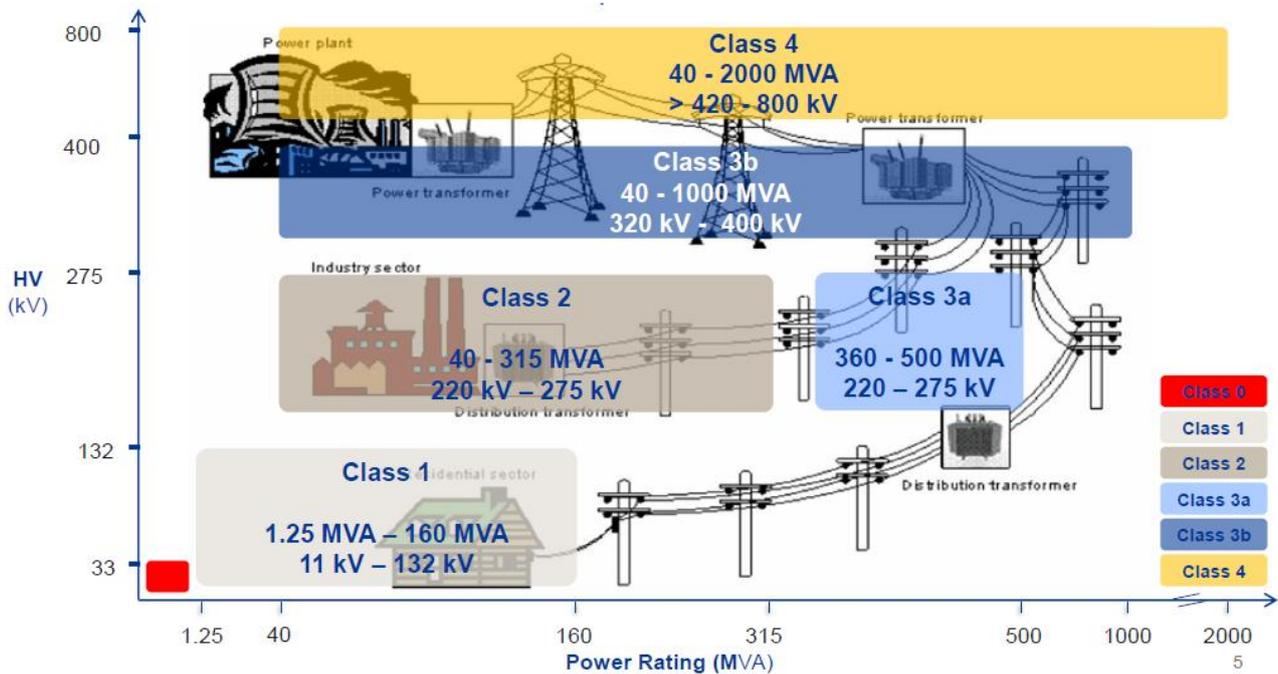


Figure 1: Classes of transformers in Eskom

2. Supporting clauses

2.1 Scope

This document covers only the evaluation criteria of the transformer and reactors tender returns. It does not specify the requirements of the mentioned equipment.

2.1.1 Purpose

This document was produced in order to record the standardized scoring method.

2.1.2 Applicability

This document shall apply throughout Eskom Holdings Limited Divisions. It is applicable only to the interim tenders meant to supplement the CORP4565 needs.

2.2 Normative/informative references

Parties using this document shall apply the most recent edition of the documents listed in the following paragraphs.

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2.2.1 Normative

- [1] 240-60725684 Specification for oil immersed HV and EHV Power Reactors
- [2] 240-68973110 Specification for power transformers rated above 1.25MVA and with highest voltage of 2.2kV or above

2.2.2 Informative

- [3] ISO 9001 Quality management systems
- [4] 32-1034 Eskom procurement and supply management procedure
- [5] 240-53207174 Practice note and guide on the implementation of the Preferential Procurement Policy Framework Act (PPPFA)

2.3 Definitions

2.3.1 General

Definition	Description
Contractor	Refers to the supplier or bidder
Equipment	Refers to a transformer or a reactor
Mark(s)	Means a point in the scoring system
Point(s)	Means a mark on the scoring system
Tender returns	A document(s), populated or compiled by the bidder, returned as a response to a tender and were part of the requirements at the time of issuing the enquiry.

2.3.2 Disclosure classification

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

2.4 Abbreviations

Abbreviation	Description
EHV	Extra High Voltage
HV	High Voltage
MVA (r)	Mega Volt-Amperes (reactive)
SCOT	Steering Committee of Technology
SE&D	Substation Equipment and Diagnostic

2.5 Roles and responsibilities

All the Eskom employees and/or appointed bodies involved in the tender technical evaluation shall use this criterion.

2.6 Process for monitoring

This document and its relevance will be periodically evaluated by the relevant SCOT Care Group.

2.7 Related/supporting documents

The schedule A and B of the relevant AB schedules shall form part of the evaluations.

3. Evaluation Method and Requirements

3.1 Methodology

The technical tender evaluation is one of the critical gates in the enquiry chain to ensure that the bidders understand the customer's requirements and they are capable of designing, manufacturing, testing at works, prepare for shipment, transport, erect on site, commission the equipment, and can offer the required after sales technical support services. This evaluation criterion will be used to measure the suppliers or bidders in these parameters. This will be achieved by doing both the desktop exercise using tender returns and by evaluating each factory that is intended for supply of the equipment to Eskom.

Bidder must meet all the mandatory requirements and then score a minimum of 80 points out of the discretionary requirements as per Annex C.

The scoring details can be summarized as follows:

Item	Remarks
Tender returns: Mandatory	If any one of the mandatory requirements is not met, the bidder will be disqualified.
Tender returns: Discretionary or scored criteria	Each bidder must score 80 or more points otherwise will be disqualified.
Factory capability assessment	Factory capability assessments are a pre-contract requirement and are mandatory for each factory that is intended to produce units for Eskom. Factories with a valid accreditation, as per the Eskom list or are in possession of the accreditation letter that is not older than twelve months, will be exempted from the Factory capability assessment requirement .

3.2 Mandatory Requirements

The mandatory requirements are the non-negotiables and, in this document, they are divided into two. First it is about the completeness of the documents, irrespective of the correctness or compliance of the information. The second portion is the evaluation of the submitted information against the requirements of the specifications and the international standards. These are important for operational and interchangeability reasons.

3.2.1 Completeness of documents

The bidder is required to submit all the information required and each document must be correctly completed. The gaps (blanks), TBA, and similar remarks will render the document incomplete. In the cases where the required information is provided as an attachment or accompanying page, it must be so indicated and made easy to reference. If any of the required information is not available, this will result in a disqualification for missing information. All the technical information must be clearly indexed in the submission package.

3.2.2 Technical Requirements

These are the important parameters that the tenderers must comply with. If the proposal by the bidder does not meet the minimum requirements, the bidder will be disqualified, and such proposals must be clearly listed in the deviation schedule. Items in the deviation schedule are not accepted until discussed and concluded so during the design review.

The list of all mandatory items is provided in Appendix A and B of this document

3.3 Discretionary Requirements

Each of the other items will be assessed as indicated in the score list of Appendix C.

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3.4 Factory Assessment

This is a pre-contract award requirement for each factory as stipulated in section 3.1 above.

4. Annexures

The annexures are applicable to the classes of transformers, mandatory tender returns, and form part of this evaluation information.

5. Authorisation

This document has been seen and accepted by

Name and surname	Designation
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6. Revisions

Date	Rev	Compiler	Remarks
March 2023	2	M. Hlakudi	Revised factory assessment and removed the Annexure G requirement.
June 2021	1	M.Hlakudi	Moderated and simplified document 240-60725684

7. Development team

This document was developed by

- Mantsie Hlakudi
- Sidwell Mtetwa

8. Acknowledgements

The development team of 240-60725684

Annex A – Mandatory Requirements – Completeness of documents

No	Item details	Score		Remarks
1	Are the schedules AB completely filled and all the information provided?	Y	N	

Note: A “No” in any of these items will result in disqualification. Do not leave any blanks in the schedule B, where the schedule A has “xxxxxxx”, it means Eskom has no specific requirements, but the bidder must fill in a value or a meaningful response.

Annex B – Mandatory Requirements – Technical Requirements

No	Item details	Status		Remarks
1	Are the ratings (MVA and all voltages) offered correct as per schedule A?	Y	N	
2	Is the vector group correct?	Y	N	
3	Is the winding arrangement as per the schedule	Y	N	
4	Is the tap changer positioning complying with schedules A?	Y	N	
5	Are the impedances indicated as required in schedule A?	Y	N	

Note: "No" in any of these items will result in disqualification. In case the bidder supposed that Eskom made a typo, it must be clarified in time.

Annex C – Discretionary Requirements – Class 2 and above Transformers

No.	Items details	Points Awarded		
		20	10	0
1	Design evaluation with critical parameters being (dielectric, forces, thermal, and magnetic)	All parameters are within standards and best practices, plus they demonstrate reasonable safety margins	One or two parameters do not meet but can be easily addressed during design review	More than 2 parameters are not meeting the requirements.
2	Transport / shipping dimensions	All are within the specified limits	Deviations of 100mm or below from stated limits	Deviation in one or more dimensions is 100mm or above the stated limits
3	Transport /shipping weight	Within the limits	Exceed with below 0.5tons	Exceeds with 0.5 tons or more
4*	Are the bushings offered of correct technology (dry or paperless), with composite insulator and in line with the bushings specification 240-56062799	Meeting all the requirements		Dimensions and/or technology is not in line with the specifications
5	Is a correct type of tap changer offered? (On-Load Tap Changers or De-energized Tap Switches)	Yes		No

* Provide clear drawings of the items selected. No full catalogues are accepted, only extracts clearly indicating the selected component.