

	Request for Information (RFI)	Document Identifier	240-72663051	Rev	4
		Effective Date	17 June 2025		
		Review Date	June 2030		
		RFI Number	E3277DXGOU		

PART A REQUEST FOR INFORMATION (RFI)			
Description of the works/goods/services	Tuning of the Eskom PLEXOS® Model for Market Forecasting, Trading and Valuation Studies.		
Deadline for submission	07 August 2026	At (South African Standard Time)	10h00
Tender Office address	Tenders are uploaded via Eskom Tender bulletin site on the Eskom E-tendering page. https://etendering.eskom.co.za		
EOI's are to be submitted electronically via Eskom E- tendering site by the stipulated closing date and time.	RFQ's are uploaded and published on Eskom Tender Bulletin Closing date: 07 August 2026 Time: 10h00 Please note it is the responsibility of the supplier to ensure that RFI submission is submitted before the closing date and time		
Electronic Submission of RFI	The tenderer must upload the tender via Eskom Tender bulletin site on the Eskom E- tendering page. All documents need to be submitted in a PDF and Excel format (The upload size per document is 500 megabytes and total submission is restricted to 4 gigabyte). No Zip/condense files can be uploaded No hard copy will be accepted If for some reason you resubmit your EOI, then the latest version of the EOI submitted will only be accepted and all previous submission/s will be null and void. Please ensure that the submission status is indicated as complete. Supplier Help Manual guide and video can be found on Eskom E-Tendering page		
E-tendering Help Manual for supplier	Attached separately		

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Eskom Holdings SOC Ltd (“Eskom”) invites you to submit an:

Request for information (RFI) to submit information for the services as stated below. This RFI is a stand-alone information-gathering and market-testing exercise, intended only to inform and assist Eskom’s further deliberation and development of a strategy for the Tuning of the Eskom PLEXOS® Model for Market Forecasting, Trading and Valuation Studies. Eskom may request indicative prices if so, stated in this RFI.

Eskom has delegated the responsibility for this **RFI** to the signatory of this document, whose details can be found below.

1. Background and Purpose

Eskom Distribution is preparing for the impending competitive multi-market environment in South Africa (SAWEM), the transition to distribution-level trading, and the introduction of capacity remuneration and flexibility mechanisms. Eskom owns and operates a PLEXOS® Integrated Energy Model licence but requires specialist support to tune, calibrate and extend the model to trading-grade standard. This RFI seeks information from qualified consultants and PLEXOS® implementation partners on capability, methodology, indicative effort and pricing; responses will inform subsequent competitive procurement.

CAPABILITY	MINIMUM FUNCTIONAL STUDY SCOPE
System marginal-price forecasting	Short term at the native market interval (intraday, day-ahead, week/month ahead) and medium/long term. Produce SMPs, infra-marginal rents, marginal units/fuels, drivers, duration curves, volatility, scarcity and confidence bands.
Electricity multi-market	A parameterised sequence for day-ahead, intraday, balancing/imbalance and ancillary-service/reserve markets, with bilateral, forward, PPA and SAPP positions.
PPA and hedge valuation	Buyer and seller valuation of physical and financial PPAs: pay-as-produced, baseload/shaped, fixed/escalating/floating, take-or-pay, CfD, floors/caps and storage-linked structures. Report NPV/mark-to-market and distributions for shape, volume, basis, imbalance, cannibalisation and curtailment exposure.
Demand response and flexibility	Model elastic and dispatchable demand, aggregator blocks, baselines, availability, notice, duration, rebound/fatigue and non-delivery. Quantify price

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CAPABILITY	MINIMUM FUNCTIONAL STUDY SCOPE
	effects and value stacking across energy, balancing, reserves and capacity, including avoided system cost, curtailment and participant value.
Curtailment and congestion	Quantify hourly/sub-hourly curtailment by cause, node/zone/project and technology: oversupply, minimum stable generation, network congestion, system/security limits and must-run rules. Assess lost energy/revenue, compensation and mitigation through BESS, demand response, interconnection, network or plant flexibility.
Trading and portfolio risk	Optimise unit/portfolio gross margin and net power cost across owned/contracted assets, spot, bilateral, forward and cross-border positions. Include storage/hydro dispatch, hedge effectiveness, P&L/position outputs, VaR, CVaR/expected shortfall, EaR, stress tests and scenario comparison.

2. Required study Capabilities

3. Scope of Work

- **Mobilise, audit and design.** Review architecture, assumptions, horizons, topology, objects/constraints, datasets, solver/licences, workflows and outputs; identify defects and confirm the target architecture, priorities and data responsibilities.
- **Tune and extend.** Calibrate technical/economic constraints and price formation; parameterise evolving SAWEM/SAPP rules; link LT, PASA, MT and ST workflows and improve runtime without omitting material constraints.
- **Back-cast, validate and stress-test.** Test normal, scarcity/load-shedding, high-VRE/low-demand and constrained periods. Compare price bias, MAE/RMSE, distributions/duration curves, dispatch, outages, flows, reserves, unserved energy and curtailment; agree tolerances at inception.
- **Industrialize and integrate.** Build scenario/change sets, batch/API execution, run controls, regression tests, dashboards and data exports to Eskom and the ETRM. PLEXOS is the analytics engine — not the deal-capture, credit, invoicing or dynamic-study system.
- **Transfer capability.** Train modellers, analysts and traders through shadow studies and administrator/advanced-user training; provide manuals, model governance, change control, a validation calendar and post-implementation support.

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4. Deliverables and Minimum Acceptance

- **Inception and audit pack:** roadmap, licence/configuration gap, target architecture, data-responsibility matrix and prioritised backlog.
- **Tuned model suite:** version-controlled ST/MT/LT models, governed data, assumptions/data dictionary and automated input-output pipeline.
- **Executable study packs:** templates, scenarios, test cases, runbooks, dashboards and executive outputs for all six capabilities on page 1.
- **Validation pack:** back-cast and stress results, limitations and recommendations; agreed accuracy, completeness and runtime tolerances must be met.
- **Full handover:** models, source scripts, interfaces, manuals and competency assessment. Eskom requires unrestricted operational use; disclose all third-party restrictions.

5. Training and Model Support

Respondents must describe the training curriculum and ongoing model-support arrangement they will provide to embed PLEXOS® capability within Eskom. Proposals must address, at minimum:

- **Role-based training curriculum** – separate tracks for administrators, modellers, analysts and traders/risk users; foundation, advanced and study-specific modules with assessments and competency certification.
- **Shadow-study and on-the-job coaching** – Eskom staff paired with the consultant on each capability (Section 2) to co-build, run and interpret studies, with staged transfer of ownership.
- **Documentation and knowledge base** – user manuals, model governance and change-control procedures, runbooks, worked examples, validation calendar and an internal knowledge base maintained during the engagement.
- **Post-implementation support** – tiered help-desk, defined SLAs, incident response, model hot-fixes, and quarterly/annual re-calibration and health-check services for a defined support period.
- **Continuous improvement** – version upgrades, new-feature enablement, and adaptation to evolving SAWEM/SAPP market rules, regulatory changes and Eskom study needs.
- **Competency assurance** – pre- and post-training assessments, minimum pass criteria, and independent sign-off that Eskom teams can operate the tuned model without ongoing consultant dependency.

6. Supplier Evaluation Requirements

Responses to this RFI will be evaluated against the requirements below. Each criterion is scored on evidence provided (referenced projects, methodology, CVs, tools and pricing). Weightings are indicative and will be finalised in the subsequent RFI.

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Evaluation Criterion	Minimum Requirements / Evidence Sought	Weight
1. Corporate Capability & PLEXOS® Credentials	Verifiable PLEXOS® implementation partner status; minimum 5 years' experience tuning/deploying PLEXOS at ISO, TSO, utility or large trading houses; at least 3 referenced projects covering ST, MT and LT horizons; certified PLEXOS modellers on team.	10%
2. Market & Regulatory Knowledge	Demonstrated expertise in competitive electricity multi-markets (day-ahead, intraday, balancing, ancillary/reserves), CRMs, flexibility mechanisms, PPAs and SAPP; understanding of SAWEM design and NERSA regulatory context.	10%
3. Functional Study Capability (Six Capabilities)	Proven delivery across all six mandatory capabilities: (i) SMP forecasting, (ii) multi-market simulation, (iii) PPA/hedge valuation, (iv) demand response & flexibility, (v) curtailment & congestion, (vi) trading & portfolio risk (VaR, CVaR, EaR, stress tests).	15%
4. Methodology & Technical Approach	Clear methodology for audit, tuning, calibration, back-casting, validation and stress-testing; approach to linking LT-PASA-MT-ST workflows; runtime optimisation without omitting material constraints; agreed tolerances for price bias, MAE/RMSE, dispatch and unserved energy.	15%
5. Data, Integration & Industrialisation	Ability to build scenario/change sets, batch/API execution, run controls, regression tests, dashboards and data pipelines to Eskom systems and the ETRM; version control and model governance; interoperability with existing Eskom data architecture.	10%
6. Deliverables & Acceptance	Commitment to produce inception & audit pack; tuned ST/MT/LT model suite; executable study packs for all six capabilities; validation pack; and full handover (models, scripts, interfaces, manuals). Unrestricted operational use for Eskom; full disclosure of any third-party restrictions.	10%
7. Training & Capability Transfer	Role-based curriculum for administrators, modellers, analysts and traders/risk users; shadow-study and on-the-job coaching; pre/post competency assessments with minimum pass criteria; independent sign-off that Eskom can operate the model without consultant dependency.	10%
8. Post-Implementation Support & Continuous Improvement	Tiered help-desk with defined SLAs, incident response and hot-fixes; quarterly/annual re-calibration and health checks; version upgrades and adaptation to evolving SAWEM/SAPP rules; documented knowledge base and validation calendar.	5%

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Evaluation Criterion	Minimum Requirements / Evidence Sought	Weight
9. Team, Resourcing & Local Content	Named key personnel with CVs and time commitments; South African presence or partnership; B-BBEE credentials and local skills-transfer plan; capacity to mobilise within Eskom's programme timelines.	5%
10. Commercial & Risk	Indicative effort, pricing model and payment milestones tied to deliverables and acceptance; financial standing; conflict-of-interest declarations; professional indemnity, IP ownership and data-security/POPIA compliance.	10%

We look forward to receipt of your response.

Yours faithfully

Name	Designation	Signature	Date
Tsepiso Moloi	Assistant officer procurement		
Telephone number		Fax and/or e-mail address	

PART B RESPONSE SHEET IN TERMS OF A REQUEST FOR INFORMATION To be completed by the supplier			
To	Eskom Holdings SOC Ltd	Date	
Attention			
Tel no		Fax no and /or e-mail address	
From		Address	
Address			
Sender			
Description of the works/goods/services			

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Yours faithfully

Name	Designation	Signature	Date
Tsepiso Molo	Assistant Officer Procurement		
Telephone number		Fax and/or e-mail address	

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