

## 1. Introduction

This document establishes the standard technical evaluation strategy to procure a Detail Aerial Inspection Service contract, via a helicopter, for Sub-transmission networks in KZN OU.

This document details the technical strategy, the technical criteria, the enquiry returnable and method of evaluation relevant to the tender submission. This document further details the evaluation process.

## 2. Revision History

| Date     | Rev. | Compiler   | Remarks                                                                                                                                                                                                                                        |
|----------|------|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |      |            |                                                                                                                                                                                                                                                |
|          |      |            |                                                                                                                                                                                                                                                |
| Apr 2024 | 0.1  | A. Hooblal | New Detail Aerial Inspection Service contract, via a helicopter, for Sub-transmission networks criteria and returnable requirements applicable to KZN OU. This update replaces any previously published technical criteria for this programme. |
| May 2024 | 1    | A. Hooblal | Finalised Document                                                                                                                                                                                                                             |

## 3. Definitions

| Definition                                | Description                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bidder</b>                             | Tender responder                                                                                                                                                                                                                                                                                                                                         |
| <b>Desktop evaluation</b>                 | An evaluation of the documentation included in the tender returnable                                                                                                                                                                                                                                                                                     |
| <b>Enquiry returnable</b>                 | Items stipulated in the Tender Enquiry, defined as mandatory and functional, to be submitted as part of the tender submission.                                                                                                                                                                                                                           |
| <b>Eskom Assessment Representative(s)</b> | The person(s) included by Eskom to participate at various stages of the Tender Process. These representatives may include members from Network Engineering and Maintenance and Operations, amongst others.                                                                                                                                               |
| <b>Functional Technical Criteria</b>      | Functional Evaluation Criteria are weighted evaluation criteria used to identify the highest technically ranked tenderer after determining that all the Mandatory Evaluation Criteria have been met. The minimum qualifying score must be obtained for functionality in order for a tender to be considered further.                                     |
| <b>Hold Points</b>                        | Mandatory verification point beyond which work cannot proceed without approval.                                                                                                                                                                                                                                                                          |
| <b>Mandatory Technical Criteria</b>       | Mandatory criteria (gatekeepers) are 'must meet' criteria. These criteria shall not be weighted or point scored but shall be assessed on a Yes/No basis as to whether or not the criteria are met. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Functional Criteria. |



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|                                  |                                                                                                                                                                         |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Spotter</b>                   | A resource conducting aerial inspection as a line inspector                                                                                                             |
| <b>Supplier</b>                  | Means a current or potential Supplier, vendor, contractor, consultant, or service provider.                                                                             |
| <b>Technical Evaluation Team</b> | The person(s) appointed by Eskom to develop the Technical Tender Strategy, Criteria and perform the evaluation of tender submission(s) in line with Eskom requirements. |

### 4. Abbreviation

| Abbreviation | Description                    |
|--------------|--------------------------------|
| HV           | High Voltage                   |
| KZN          | Kwa-Zulu Natal                 |
| OU           | Operating Unit                 |
| NED          | Network Engineering and Design |
| M&O          | Maintenance and Operations     |
| SI           | Standards Implementation       |
| TET          | Technical Evaluation Team      |
| NCR          | Non-Conforming Report          |

### 5. Technical Scope

The service must include the detail aerial inspection of all sub-transmission networks in KZN OU with the following criteria:

- The helicopter equipped with the multi-spectrum camera (Infra-red, Corona detection, HD),
- The fuel and fuel transporter,
- The pilot, the spotter, and the camera operator
- The detail defect reports with pictures, GPS coordinates of
  - All identified defects.
  - Pictures of all towers with GPS coordinates
  - Pictures of all tower spans
- Detail components to inspect must be according to Eskom standard: 240-71380115
- The following Eskom standards are also applicable in relation to this activity:
  - 240-138196972
  - 240-170000630

## **6. Technical Tender Enquiry Strategy**

The technical tender documentation will be developed by the Technical Evaluation Team and will form part of the Commercial Enquiry.

The tender technical information and documentation will include (amongst other documents if necessary):

- The technical specification which will include the Scope of Work, the specifications and standards, the engineering drawings, specific design instructions and the bill of quantities.
- The technical evaluation criteria and returnable (including standard returnable templates such as the deviation schedule).

Technical tender evaluation criteria will be established in order to determine the Bidder's capability to provide the service of detail aerial inspections, using a helicopter, in accordance with Eskom and Eskom KZN OU's specific requirements.

The tender returnable will be defined in order to ensure the bids received are responsive and contain the required evidence in order to test the submission against the criteria. The tender submission must meet all the requirements of the Mandatory Criteria in order to proceed to the Functional Evaluation. Submissions evaluated against the Functional criteria will receive a score that needs to meet or exceed the defined threshold in order to be considered technically compliant.

### **6.1. Technical Criteria and Returnable**

The technical criteria stipulate Eskom's requirements to which the Bidder must comply to be considered as compliant. The technical returnable is the evidence that is required to be submitted in order to demonstrate compliance to the criteria.

The technical evaluation is made up of respective stages within which the tender is evaluated. Stage 1 and 2 is an evaluation on paper. Stage 1, namely mandatory requirements. If all Stage 1 requirements have been satisfied, then the evaluation will proceed to Stage 2 which is the evaluation of the predefined functional requirements. All functional criteria will be scored, and a threshold will be set for stage 2. If the stage 2 threshold is met, then the qualifying bids will be ranked from highest to lowest and will be considered for selection.

Stage 3 (service assessment and verification at tenderer's premises) is applicable only to the tenderer(s) who passed the stipulated requirements of stages 1 and 2.

#### **6.1.1. Mandatory Returnable Criteria**

Table 1 stipulates the Mandatory Criteria and required returnable to be included in the tender submission. Failure to provide the stipulated evidence will result in the submission being disqualified and the evaluation will not proceed further. Mandatory requirements are listed on table 1 below. There will be no scoring linked to these requirements. A "Yes" or "No" result will be allocated. It is required that the tender submission achieve "Yes" allocation for all mandatory requirements listed on the table

below in order to proceed to the next part of the evaluation. If a “No” is allocated to one or more criteria then the submission will be considered non-responsive and will be disqualified.

**Table 1: Mandatory Criteria and Returnable**

| Item | Criteria   | Returnable                                                                                                                                                                        | Quantity | Scoring Method |
|------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------------|
| 1    | Helicopter | Proof of ownership for Aircraft, Certificate of Registration of Aircraft<br>OR<br>Proof of hiring aircraft and Hire Letter from Bona Fide hiring company to be included if hired. | 1        | Yes/No         |
| 2    | Pilot      | Certified proof of Pilot license validated in accordance with regulations of the South African Civil Aviation Authority (SACAA)                                                   | 1        | Yes/No         |

## 6.1.2. Functional Returnable Criteria

The Functional Criteria and required returnable are stated in Table 2 below.

The returnable will be assessed, and scores will be allocated accordingly. Final scores shall be stated in percentage terms.

The threshold for these criteria is set at 80%. Submissions failing to meet the stipulated threshold will be deemed non-compliant; the submission will be disqualified and not evaluated further.

### **Important – Commissioner of Oaths requirements for evidence:**

Copies of all **certificates** and **affidavits** shall be submitted. The copies **must be certified** by a Commissioner of Oaths **clearly legible and certified not older than three months** from the date of tender close. The Commissioner’s details, with **signature and date must be clearly visible**.

### **Important – Employment of resources:**

All resources presented as evidence must be employed at the tendering company during the tender period. The tender period includes tender closing date extensions. Use affidavit template from Annexure.

**Table 2: Functional Criteria and Returnable**

| Item | Criteria                                        | Returnable                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Weight | Quantity |
|------|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------|
| 1    | Helicopter with Multi-spectrum camera installed |                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |        |          |
| 1.1  | Gimbal device for aircraft (Helicopter)         | Valid Calibration Test certificate that matches gimbal device or<br>Proof of hiring device and Hire Letter from Bona Fide hiring company to be included if hired                                                                                                                                                                                                                                                                                                             | 10%    | 1        |
| 1.2  | Multi-spectrum camera                           | Certified letter from the company as proof of camera devices for HD pictures and video, & UV Corona detection or<br>Proof of hiring device and Hire Letter from Bona Fide hiring company to be included if hired                                                                                                                                                                                                                                                             | 10%    | 1        |
| 1.3  | Infra-red thermography camera                   | Certified letter from the company as proof of camera device for detection of hot connections or<br>Proof of hiring device and Hire Letter from Bona Fide hiring company to be included if hired                                                                                                                                                                                                                                                                              | 10%    | 1        |
| 2    | Spotter                                         | Certified proof of certificate in electrical engineering (diploma as minimum), Qualification: Electrical Engineering, HV; Required experience:<br>1 year – 5%<br>2 years – 10%<br>3 years - 15%<br>4 years – 20%<br>5 years – 25%<br><br>Affidavit: The affidavit template provided must be used as the returnable. This affidavit will be used as confirmation of employment of the resources named on the certificates, at the tendering company during the tender period. | 25%    | 1        |
| 3    | Camera Operator                                 | Certified proof of certificate in electrical engineering (diploma as minimum), Qualification: Electrical Engineering, HV; Required experience:<br>2 years – 5%<br>3 years - 10%<br>4 years – 15%<br>5 years – 20%<br><br>Affidavit: The affidavit template provided must be used as the returnable. This affidavit will be used as confirmation of employment of the resources named on the certificates, at the tendering company during the tender period.                 | 20%    | 1        |

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|   |                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |     |   |
|---|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---|
| 4 | Report Compiler                           | <p>Certified proof of certificate in electrical engineering (diploma as minimum), Qualification: Electrical Engineering, HV; Required Experience:<br/>NB. Can be the same resource as item no. 2 or 3 above.<br/>1 year – 5%<br/>3 years - 10%<br/>5 years – 15%</p> <p>Affidavit: The affidavit template provided must be used as the returnable. This affidavit will be used as confirmation of employment of the resources named on the certificates, at the tendering company during the tender period.</p> | 15% | 1 |
| 5 | Thermal Imaging Analysis software         | Proof of licensed software to analyse thermal images                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 5%  | 1 |
| 6 | Sample of detail aerial inspection report | A sample of a previous aerial inspection report must be submitted which is not older than 24 months                                                                                                                                                                                                                                                                                                                                                                                                             | 5%  | 1 |

### 6.1.3. Service Assessment and Verification (on site)

Service Assessment and Verification will require the Eskom Assessment Representatives to inspect the equipment and tooling and final product (defects report), to assess the capability of the tenderer(s) to perform the detail aerial inspection service as required and to enter into a contract with Eskom. Demonstration of the service may be required. The evaluation is performed at the tenderer (s) premises. The Service evaluation is not confirmation or a guarantee that any contract will be entered into by Eskom and the tenderer or that post contract performance has been achieved.

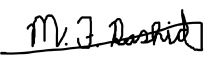
Eskom commercial representative(s) will arrange to visit the premises of tenderers whose submissions have met the 80% minimum threshold.

At the tenderer's premises, the Eskom evaluation representative(s) conducts the evaluation by using the checklists and the evaluation documents. The checklists are used to verify compliance to the tool requirements and the tender submission documents. At the end of this exercise, the Eskom evaluation representative(s) lists all the deviations, if any, on the evaluation agreement document. All parties' representatives conducts a formal discussion of the deviations in line with Eskom's requirements. Thereafter, the Eskom, and the tenderer/vendor representatives sign the evaluation agreement document which continues to be used for concluding the technical evaluation report. The tenderer and the tenderer agree to meet the Eskom requirements to be a 100% compliant product. All of this forms part of the contract and the verification thereafter.

If the Service Assessment and Verification identifies a deviation from the Bidder's tender submission that is not rectifiable within 14 days, then the submission will be disqualified.

### 6.1.4. Conclusion of the Tender Process

The technical support of the tender process concludes once the service of inspecting the list of HV networks and submitting all aerial inspection reports is complete.

| Name            | Designation                 | Signature                                                                            | Date        |
|-----------------|-----------------------------|--------------------------------------------------------------------------------------|-------------|
| Ashveer Hooblal | Plant Maintenance Engineer  |  | 07/10/2024  |
| Mohammed Rashid | Maintenance & Asset Manager |  | 07 Oct 2024 |

**Annexures: Extract of Tender Criteria and Standard Templates for  
Technical Returnable for the Tender Pack**

- A. Affidavit
- B. Service Assessment and Verification Criteria



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**Annexure A: Affidavit Confirming Employment of Resource**

I, \_\_\_\_\_ (full names),

ID Number: \_\_\_\_\_,

hereby confirm that I am currently employed as (tick all where appropriate):

☐

Accredited Line Spotter, with \_\_\_ years' experience

☐

Camera Operator, with \_\_\_ years' experience

☐

Report compiler Resource, with \_\_\_ years' experience

at \_\_\_\_\_ (Tendering Company Name).

I solemnly declare that all the information contained herein is true.

**Signature of Employee:** \_\_\_\_\_

**Sworn to/Affirmed before me at** \_\_\_\_\_

on this the \_\_\_\_\_ day of \_\_\_\_\_ (month & year).

**Commissioner of Oaths/Justice of Peace:**

.....

(Commissioner's stamp, with signature and date)



## Technical Evaluation Strategy and Criteria for the Procurement of the Detail Aerial Inspection Service in the Central East Cluster (KZN & FS OU).

### Annexure B: Service Assessment and Verification Criteria

| GENERAL INFORMATION                                                                   |           |
|---------------------------------------------------------------------------------------|-----------|
| a) Name of Tenderer:                                                                  |           |
| b) Registered name and full street address at which the audit and inspection is done: |           |
| c) Tenderer's Representatives:                                                        |           |
| Name:                                                                                 | Position: |
| Name:                                                                                 | Position: |
| Name:                                                                                 | Position: |

| Criteria                               | Requirements                                                                                            |
|----------------------------------------|---------------------------------------------------------------------------------------------------------|
| Inspection of tools/equipment          | Inspect Cameras (HD)                                                                                    |
| Inspection of tools/equipment          | Inspect Cameras (Infra-red)                                                                             |
| Inspection of tools/equipment          | Inspect Gimbal device                                                                                   |
| Quality Assurance of aerial inspection | Inspect sample aerial inspection report to determine if all requirements are within the report template |

|                 |                               |
|-----------------|-------------------------------|
| Findings        |                               |
|                 |                               |
| Conclusion      |                               |
|                 |                               |
| Recommendations |                               |
|                 |                               |
| Date:           | Date:                         |
| Auditor's name: | Tenderer Representative name: |
| Signature:      | Signature:                    |



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