

 Eskom	Strategy	Research, Testing and Development
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Title: Tender technical evaluation strategy for transactional advisor services to conduct Feasibility study for establishment of the BESS manufacturing facility

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1. INTRODUCTION

The global energy sector is undergoing a profound and rapid transition towards renewable energy sources. For Eskom, this shift is not merely a trend but a strategic imperative that necessitates innovation to secure its relevance and leadership in a decarbonized future. Battery Energy Storage Systems (BESS) are a cornerstone technology in this transition, offering the critical capability to enhance grid stability, enable the seamless integration of variable renewable energy (like wind and solar), and ultimately, bolster South Africa's energy security.

Currently, South Africa's complete reliance on international supply chains for battery cells creates significant strategic vulnerabilities. This dependency exposes the nation to price volatility, geopolitical supply risks, and complex logistical challenges. To mitigate these risks and capitalize on the immense opportunity for local industrial and economic development, Eskom is proposing the establishment of a domestic BESS manufacturing value chain.

To ensure the success of this strategic investment, Eskom needs a thorough feasibility study that will assess the technical, financial, market, and operational viability of the proposed manufacturing facility. The analysis should encompass a thorough examination of various aspects, including evaluating market demand, selecting appropriate technologies, designing facilities, strategizing supply chains, establishing partnership frameworks, ensuring regulatory compliance, and assessing economic impacts.

2. SUPPORTING CLAUSES

2.1 SCOPE

Conduct a comprehensive feasibility study that will assess the technical, financial, market, and operational viability of the proposed manufacturing facility. The analysis should encompass a thorough examination of various aspects, including evaluating market demand, selecting appropriate technologies, designing facilities, strategizing supply chains, establishing partnership frameworks, ensuring regulatory compliance, and assessing economic impacts.

2.1.1 Purpose

The purpose of this tender technical evaluation strategy is to define the Mandatory Evaluation Criteria, Qualitative Evaluation Criteria and TET member responsibilities for tender technical evaluation. The technical evaluation strategy serves as basis for the tender technical evaluation process.

2.1.2 Applicability

This document applies to the Generation Division.

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] 240-48929482: Tender Technical Evaluation Procedure
- [2] Conduct a comprehensive feasibility study for the establishment of a Battery Energy Storage System (BESS) manufacturing facility at the Grootvlei Power Station, Mpumalanga Province, South Africa.

2.2.2 Informative

- [3] ISO 9001 Quality Management Systems

2.3 DEFINITIONS

2.3.1 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Meaning given to the abbreviation
BESS	Battery Energy Storage Systems
GWh	Gigawatt Hour
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

2.6 PROCESS FOR MONITORING

N/A

2.7 RELATED/SUPPORTING DOCUMENTS

N/A

3. TENDER TECHNICAL EVALUATION STRATEGY

3.1 TECHNICAL EVALUATION THRESHOLD

Mandatory Technical Evaluation 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 Qualitative Criteria.

Qualitative Technical 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 Qualitative Evaluation Criteria are weighted to reflect the relevant importance of each criterion. The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 80%.

The evaluation of the tender submission will be based on the tenderer's ability to meet the engineering and feasibility study requirements. A weighted score card approach will be used to evaluate the tender submission against the specifications and Employer's requirements.

Table 1: Evaluation Criteria

EVALUATION CRITERIA	WEIGHTING
Stage 1	MANDATORY TECHNICAL EVALUATION CRITERIA
Stage 2	Qualitative Technical Evaluation Criteria
Technical/Functional Requirements	Threshold of 80% for Functionality
TOTAL	100

The scoring method will be as shown Table 2.

Table 2: Qualitative Evaluation Criteria Scoring

Score	(%)	Definition
5	100	COMPLIANT <ul style="list-style-type: none">• Meet technical requirement(s) AND;• No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS Meet technical requirement(s) with; <ul style="list-style-type: none">• Acceptable technical risk(s) AND/OR;• Acceptable exceptions AND/OR;• Acceptable conditions.
2	40	NON-COMPLIANT <ul style="list-style-type: none">• Does not meet technical requirement(s) AND/OR;• Unacceptable technical risk(s) AND/OR;• Unacceptable exceptions AND/OR;• Unacceptable conditions.
0	0	TOTALLY DEFICIENT OR NON-RESPONSIVE

3.2 TET MEMBERS

Table 3: TET Members

TET number	TET Member Name	Designation
TET 1	Mashudu Ndwambi	Senior Advisor, RT&D
TET 2	Tshitso Tamane	Senior Engineer, RT&D
TET 3	Kammy Young	IP Manager, RT&D
TET 4	Thomas Jacobs	Chief Engineer, Distribution
TET 5		
TET 6		
TET 7		

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3.3 MANDATORY TECHNICAL EVALUATION CRITERIA

TABLE 4: MANDATORY TECHNICAL EVALUATION CRITERIA

	Mandatory Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1.	Technical Expertise in battery cell manufacturing	<ul style="list-style-type: none">• Project Portfolio & Case Studies (verifiable)-projects completed in the last 5-10 years.• Key Personnel CVs- showing 5-10 years of experience in battery cell manufacturing.• IP registration documents.	This gatekeeper ensures that any potential supplier has already successfully navigated the challenges and can provide credible, experience-based insights, not just theoretical analysis.
2.	Feasibility study Expertise	Project Portfolio & Case Studies (verifiable)-projects completed in the last 5-10 years	This gatekeeper ensures that any potential supplier has already successfully conducted a feasibility study.

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3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 5: Qualitative Technical Evaluation Criteria

	Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Scoring Criteria	Criteria Weighting (%)
1.	Experience and Capability				10
	1.1	Battery Manufacturing Experience	Company profile, project references, manufacturing track record documentation showing annual production volumes and types of batteries manufactured.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Company profile is provided, but with no battery manufacturing experience. 2%: The company profile includes one battery manufacturing project reference. 4%: The company profile includes more than one battery manufacturing project reference, production volumes and battery types. 	4
	1.2	Production Scale Capability	Evidence of existing or planned facilities with capacity $\geq 1\text{GWh}$ annually.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Mentions future plans for $>1\text{GWh}$ capacity but provides no tangible evidence or specifications. 2%: Provides evidence of existing or planned facilities but does not meet the $\geq 1\text{GWh}$ annual capacity threshold. 3%: Provides detailed evidence of existing, operational facilities with a capacity significantly exceeding 1GWh annually. 	3

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	1.3	Technology Maturity and Proven Performance	Type test certificates, performance data, failure rate statistics, commercial deployment records for battery systems.	<ul style="list-style-type: none"> 0%: No evidence provided. 1%: General claims of technology maturity are made without any supporting data or documentation. 2%: Provides type test certificates but includes limited performance data or failure rate statistics. 3%: Provides comprehensive documentation, including internationally recognized type test certificates, extensive in-field performance data, low failure rate statistics, and a substantial record of successful commercial deployments. 	3
2.	Technical Design and Engineering				10
	2.1	Battery Chemistry and Technology Selection	Technical justification for proposed battery chemistry, performance specifications.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Names a proposed battery chemistry but provides no technical justification or data. 2%: Provides a basic justification for the proposed chemistry but lacks detailed performance specifications. 4%: Provides a comprehensive and compelling technical justification for the selected chemistry, backed by superior performance specifications and a clear alignment with the project's goals. 	4
	2.2	Plant Design and Layout Optimization	Conceptual facility design, process flow diagrams, clean room specifications, automation levels, material flow optimization.	<ul style="list-style-type: none"> 0%: No design information provided. 	3

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				<ul style="list-style-type: none"> 1%: A very basic, high-level concept of the plant layout is mentioned without diagrams. 2%: Provides a conceptual facility design but lacks detailed process flow diagrams or specifications for key areas like clean rooms. 3%: Provides an outstanding and highly optimized conceptual design with detailed process flow diagrams, advanced material flow optimization, information of automation, and precise clean room specifications. 	
	2.3	Product Integration Capabilities	System integration specifications, BMS capabilities, fire suppression systems, communication interfaces.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Mentions system integration capabilities in general terms. 2%: Provides basic information on Battery Management System (BMS) capabilities but lacks detail on fire suppression or communication interfaces. 3%: Provides comprehensive and advanced specifications for all aspects, including a highly capable BMS, a certified fire suppression system, and versatile communication interfaces compatible with multiple platforms. 	3
3.	Supply Chain and Raw Materials				10
	3.1	Raw Material Sourcing Strategy	Supply chain mapping, raw material sourcing plans, and local content development strategy	<ul style="list-style-type: none"> 0%: No information provided. 1%: A vague statement about sourcing raw materials is made without any mapping or specific plans. 	4

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				<ul style="list-style-type: none"> 2%: Provides a basic supply chain map but lacks detailed sourcing plans or a local content strategy. 4%: Provides a robust supply chain map, detailed sourcing plans, and a credible initial strategy for local content development. 	
	3.2	Supply Chain Risk Management	Risk assessment matrix, supplier diversification strategy, inventory management systems, stakeholder mapping and contingency plans	<ul style="list-style-type: none"> 0%: No information provided. 1%: Acknowledges supply chain risks exist but provides no formal plan. 2%: Provides a basic risk assessment but lacks a clear supplier diversification or contingency plan. 3%: Provides a detailed risk assessment matrix, a clear supplier diversification strategy, and well-defined contingency plans. 	3
	3.3	Local Content Development	Proposal for local supplier development, local sourcing targets, job creation forecasts.	<ul style="list-style-type: none"> 0%: No proposal provided. 1%: Mentions local development as a possibility without any firm proposals, targets, or forecasts. 2%: Provides a high-level proposal for local supplier development but lacks specific sourcing targets or job creation forecasts. 3%: Provides a credible proposal with defined local sourcing targets and reasonable job creation forecasts. 	3

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4.	Partnership and Knowledge Transfer				10
	4.1	Partnership Model and Structure	Proposed partnership framework (JV, licensing, strategic alliance), governance structure, risk sharing mechanisms.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Expresses interest in a partnership without proposing a specific model. 2%: Proposes a partnership model (e.g., JV) but provides no detail on governance or risk sharing. 5%: Proposes a comprehensive, well-structured partnership model with a robust governance framework, clear roles, and a detailed, equitable risk/reward sharing mechanism that is highly aligned with the project's success. 	5
	4.2	Intellectual Property Strategy	Proposed IP licensing terms, technology transfer, knowledge sharing frameworks, IP protection mechanisms.	<ul style="list-style-type: none"> 0%: No information provided. 1%: Mentions IP but provides no specific terms or strategy. 2%: Outlines proposed IP licensing terms and a framework for technology transfer, but with limited detail on IP protection/ 5%: Provides a comprehensive and mutually beneficial IP strategy with clear licensing terms, a structured knowledge-sharing framework, and strong IP protection mechanisms for both parties. 	5
5.	Feasibility Study Experience and Methodology				50

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	5.1	Study Methodology and Approach	Detailed methodology for conducting the feasibility study, work breakdown structure, quality assurance processes, risk management approach	<ul style="list-style-type: none"> 0%: No information provided. 10%: A very basic, high-level outline of the study approach is provided, lacking key details. 25%: A partial methodology is provided, covering some key areas but missing a detailed work breakdown structure (WBS) or risk management approach. 35%: A complete methodology is provided, including a WBS and approach to quality assurance and risk management, but it lacks innovation or depth. 50%: An exceptional and highly detailed methodology is submitted. It demonstrates a deep understanding of the project's complexities and includes a sophisticated WBS, advanced quality assurance processes, a proactive risk management approach, and clear, logical phasing. The approach is clearly superior and instills high confidence 	50
6.	Environmental and Sustainability				10
	6.1	Environmental, Energy and Water Management	List of required licenses/permits and assessments to be conducted.	<ul style="list-style-type: none"> 0%: No information provided. 3%: Acknowledges that environmental permits are required but provides no list or details. 7%: Provides a detailed list of all required licenses/permits and a clear plan for the 	10

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				<p>environmental assessments (e.g., EIA) to be conducted, including proposed timelines.</p> <ul style="list-style-type: none"> 10%: Provides a comprehensive and detailed list of all required licenses and permits, a full plan for all necessary environmental, energy, and water. 	
					TOTAL: 100

Completed Technical Requirements Form : The evaluation of technical proposals will be based on the scoring results outlined in the technical scoring table above. For each requirement to receive a score, the bidder must fully meet all related sub-criteria. **If any of the sub-criteria for a requirement are not fully satisfied, no score will be awarded** for that requirement.

Final Scores and Ranking: The total weight for Qualitative Technical Evaluation Criteria is **100%**. For a tenderer to be recommended for further commercial evaluation the tenderer must achieve a minimum threshold of **80%**.

3.5 TET MEMBER RESPONSIBILITIES

Table 6: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2	TET 3	TET 4	TET 5	TET 6	TET 7
1	X	X	X	X	X	X	X
2	X	X	X	X	X	X	X
3	X	X	X	X	X	X	X

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**Tender Technical Evaluation Strategy for Transactional Advisor to
Conduct Feasibility for Establishment of the BESS Manufacturing
Facility**

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4	X	X	X	X	X	X	X
5	X	X	X	X	X	X	X
6	X	X	X	X	X	X	X
7	X	X	X	X	X	X	X
8	X	X	X	X	X	X	X
9	X	X	X	X	X	X	X
10	X	X	X	X	X	X	X
11	X	X	X	X	X	X	X
12	X	X	X	X	X	X	X
13	X	X	X	X	X	X	X
Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4	TET 5	TET 6	TET 7
1	X	X	X	X	X	X	X
2	X	X	X	X	X	X	X
3	X	X	X	X	X	X	
4	X						X
5	X						X

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6	X						X
7		X	X	X	X	X	
8							
9							
10							
11							

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Foreseen Acceptable / Unacceptable Qualifications

3.4.1 Risks

Table 7: Acceptable Technical Risks

Risk	Description
1	1: COMPLIANT: Meets all applicable sub-criteria
2	1: COMPLIANT: Meets all applicable sub-criteria
3	1: COMPLIANT: Meets all applicable sub-criteria
4	1: COMPLIANT: Meets all applicable sub-criteria
5	1: COMPLIANT: Meets all applicable sub-criteria
6	1: COMPLIANT: Meets all applicable sub-criteria
7	1: COMPLIANT: Meets all applicable sub-criteria
8	1: COMPLIANT: Meets all applicable sub-criteria
9	1: COMPLIANT: Meets all applicable sub-criteria
10	1: COMPLIANT: Meets all applicable sub-criteria
11	1: COMPLIANT: Meets all applicable sub-criteria

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Table 8: Unacceptable Technical Risks

Risk	Description
1	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
2	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
3	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
4	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
5	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
6	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
7	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
8	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
9	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE
10	0: NON-COMPLIANT

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	0: TOTALLY DEFICIENT OR NON-RESPONSIVE
11	0: NON-COMPLIANT 0: TOTALLY DEFICIENT OR NON-RESPONSIVE

3.4.2 Exceptions / Conditions

Table 9: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	None

Table 10: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	None

4. AUTHORISATION

This document has been seen and accepted by:

Name	Designation
Mashudu Ndwambi	Senior Advisor, RT&D
Tshitso Tamane	Senior Engineer, RT&D
Kammy Young	IP Manager, RT&D
Thomas Jacobs	Chief Engineer, Distribution
Mfundi Songo	Senior Manager, Generation

5. REVISIONS

Date	Rev.	Compiler	Remarks
13 August 2025	1	Mashudu Ndwambi	New document

6. DEVELOPMENT TEAM

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

- Mashudu Ndwambi
- Thomas Jacobs
- Kammy Young
- Mfundi Songo

7. ACKNOWLEDGEMENTS

N/A