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# Technical Evaluation Criteria for smart meter installations Contract

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This presentation outlines the Technical Evaluation Criteria (TEC) applied by the Technical Evaluation Team (TET) within the Free State Operating Unit (FSOU). The criteria set out in this document describes the guiding framework used to assess contractor submissions in response to the Smart Meter Installations Panel Contract Enquiry. The aim is to ensure that only capable and compliant service providers (or contractors) are shortlisted to form part of the Panel of Contractors (PoC), to maintain consistently and reliable level of service delivery.

The following will be covered:

- Evaluation Process
- Mandatory Evaluation Phase
- Functional Requirements
- Contractual Requirements

- Technical Returnables must be submitted either as a separate technical file or as a clearly indexed section within a larger document or folder labelled **"Technical"**. Submissions should follow logical indexing to ensure clarity and accessibility.
- **Important Submission Prescriptions:**
  - Where possible, it is recommended that forms be completed digitally. (Available to download)
  - Where proforma submissions are required, **only** the prescribed annexure forms will be accepted.
  - Any inaccurate, false, or fraudulent information—whether provided deliberately or by accident—may be referred to the appropriate forensic departments for investigation and could result in legal proceedings.
- The evaluation process consists of three distinct phases that follows a chronological order:
  - **Mandatory**
    - Evaluated on a pass or fail basis. Only submissions that passes this stage will then be considered in the next stage of evaluation. All those that are evaluated as failed will not be evaluated further.
  - **Functional**
    - Assessed based on the quality and quantity of supporting evidence, resulting in a weighted percentage score. All functional criteria will be scored against a minimum threshold. If the threshold is met or exceeded, the qualifying bids continues with Tender Evaluation for further stage evaluations. The outcome of the functional evaluation results will be utilized to determine a ranked outcome of all successful submissions.
  - **Contractual Obligation Requirements**
    - This stage will include non-scoring/informational criteria to be assessed at contract award stage. It outlines the final technical requirements, including all necessary authorisations and compliance with applicable technical standards and criteria.

## ▪ PRELIMINARY EVALUATION

The Preliminary Evaluation is an initial check performed to determine if a detailed mandatory evaluation is viable to be performed. The primary focus of the Preliminary Evaluation is to ensure prescribed compliance and completeness of the technical submission. Table 1 list the items/Returnables and prescribed requirements evaluated as part of the Preliminary Evaluation.

**Note:** If any required documentation is omitted (i.e., not submitted) or incomplete (i.e., not signed, certified or has insufficient information), the technical submission will be discarded and disqualified without giving the tenderer an opportunity to submit or resubmit the outstanding documentation.

The evaluators shall review the total technical submission and indicate a Pass or Fail for each item listed in Table 2. Only submissions that pass all the items will continue with the evaluation process; if any item is marked as 'Fail', the submission will not be further evaluated and will be considered unsuccessful.

# Mandatory Evaluation Phase: Preliminary Evaluation



Nr.	Submission Returnable	Required Qualification Evidence	Evaluation
1.	Electrical Contractor Registration Certificate (Department of Labour)	Department of Labour Certificate <ul style="list-style-type: none"> <li>Certified Valid Department of Labour Certificate (Letter of Registration) in your Company Name / Trading as name or Company Owner</li> </ul>	Submitted: Pass Not Submitted: Fail
2.	Skills Resources Schedule	Annexure B – Skills Resources Schedule <ul style="list-style-type: none"> <li>Completed in full</li> <li>Signed and dated by Owner</li> </ul>	Submitted: Pass Not Submitted: Fail
3.	Vehicle Schedule	Annexure C – Vehicles Schedule <ul style="list-style-type: none"> <li>Completed in full</li> <li>Signed and dated by Owner</li> </ul>	Submitted: Pass Not Submitted: Fail
4.	Tools & Equipment Schedule	Annexure C – Vehicles Schedule <ul style="list-style-type: none"> <li>Completed in full</li> <li>Signed and dated by Owner</li> </ul>	Submitted: Pass Not Submitted: Fail
5.	Nearest Base of Operation	Annexure A – Base of Operation <ul style="list-style-type: none"> <li>Completed in full</li> <li>Signed and dated by Owner</li> </ul> <b>AND</b> At least one of the following: <ul style="list-style-type: none"> <li>Lease Agreement, with corresponding address as stipulated in Annexure D</li> </ul> <b>OR:</b> Title deed or bond statement <b>OR:</b> Letter from Property Owner or Primary Lease holder <b>OR:</b> A letter from Property Owner or property manager confirming intent to rent property upon successful contracting	Submitted: Pass Not Submitted: Fail
Preliminary Evaluation Outcome			Fails > 0: Unsuccessful Pass = 5: Continue



## ▪ DETAILED MANDATORY EVALUATION

Submissions that fulfil all Preliminary Evaluation requirements will progress to the Detailed Mandatory Evaluation phase of the technical evaluation process. This evaluation is essential to verify that the tendering contractor possesses, or has access to, the necessary skills, machinery, and resources required to execute the scope of work outlined for Smart Meter Installation Projects.

**Important:** If a submission fails to meet any of the Mandatory Requirements (as outlined in Table 2, Table 3 and Table 4) the entire submission will be deemed unsuccessful and will not proceed to the next stage of evaluation (Functional Requirements).

## ■ Skills Resources

The following documents is required to be submitted for each resource listed on Annexure B – Skills Resources Schedule

1. Certified Identification Document
2. Annexure B1 – Affidavit of Employment Confirmation
3. Annexure B2 – Consent Form For Processing Personal Information

AND

All training certificates required for the specific skill(s) as listed in Table 2; valid and certified.

If any of the above documents are not included or fail to meet the minimum criteria as part of the technical submission, the resource will not be considered as contributing to the evaluation outcome.

# Mandatory Evaluation Phase: Skills Resources

Nr.	Resource Skill	Required Qualification Evidence	Mandatory Requirement	Functional Evaluation
1.	LV Authorised Person	Applicable valid and certified training certificates for a “Responsible Person” according to 240-70413681: Portfolio of Evidence (Refer Annexure B3 – LV Authorisation Prerequisite Courses) OR Valid authorisation for “Outcome 3 Responsible Person” for LV Work Note: Permit cards will not be accepted as valid evidence.	Minimum Requirement: 1 0: Fail 1: Pass	1: 5% 2: 10% 3: 15% 4: 20% (max)
2.	Meter Worker	Certified Level 2 Meter Worker Certificate OR Certified split meter training certificates (OTO 06G, OTO 06C, OTO 06A), issued by an accredited facilitator that is listed on Eskom’s National Facilitators Database AND Certified training certificate for SPU Maintenance and Commissioning Course OR Signed and dated letter of intent to obtain the SPU Maintenance and Commissioning Course certificate within 6 (six) months after tender award	Minimum Requirement: 1 0: Fail 1: Pass	1: 10% 2: 15% 3: 20% (max)
3.	LV Lineman	Certified LV Line Construction training certificate per resource, issued by an accredited facilitator that is listed on Eskom’s National Facilitators Database It must be demonstrated that modules ELW011 and ELW012 were successfully completed and passed.	N/A	1: 5% (min/max)
4.	Installation Electrician	Certified and Valid Department of Labour Registration as Electrical Contractor document	Minimum resource requirement: 1 0: Fail 1: Pass	1: 5% 2: 10% (max)
5.	Cable Technician	Further Education and Training Certificate: Cable Jointing and Termination SAQA QUAL ID: 58204	N/A	1: 5% (min/max)
	<b>Outcome</b>	For Mandatories Pass or Fail. For Functional weighted percentage score per item.	<b>No ‘Fail’ result</b>	<b>Summation</b>



## ■ Vehicles

The following documents is required to be submitted for each vehicle listed on Annexure C – Vehicles Schedule:

1. For proof of ownership, include a copy the vehicle registration, license disc or license information
2. For proof of hiring, include a letter from a hiring company

If any of the above documents are not included as part of the technical submission, the vehicle will not be considered as contributing to the evaluation outcome.

All the requirements needed to pass the mandatory stage is outlined Table 3.

# Mandatory Evaluation Phase: Vehicles

Nr.	Vehicle Description	Required Returnable Evidence	Mandatory Requirement	Functional Evaluation
1.	Light Delivery Vehicle Minimum 1t GVM Maximum 3.5t GVM	Owned: <ul style="list-style-type: none"> <li>Full Licence document showing company / owner's information</li> <li>Licence document must be certified and not older than 3 months from the tender closing date.</li> </ul> OR Hired: <ul style="list-style-type: none"> <li>Letter from Hiring Company</li> <li>A tenderer is not allowed to hire from another Electrical construction Company.</li> </ul>	Minimum owned or hired: 1  0: Fail 1: Pass	1: 5% 2:10% (max)
2.	Truck with suitable Vehicle Mounted Crane Crane Lifting Capacity: Minimum 3,000 kg (3 tons) Minimum Lifting Height: 6 metres Vehicle Gross Vehicle Mass (GVM): Minimum 9,000 kg	Owned: <ul style="list-style-type: none"> <li>Full Licence document showing company / owner's information</li> <li>Licence document must be certified and not older than 3 months from the tender closing date.</li> </ul> OR Hired: <ul style="list-style-type: none"> <li>Proof of hiring contract / pre-approved letter from Bona Fide Vehicle Hire Companies must be submitted.</li> </ul> A tenderer is not allowed to hire from another Electrical construction Company.	Minimum owned or hired: 1  0: Fail 1: Pass	1:8% (min/max)
3.	Passenger/Staff Transport Minibus, crew cab LDV, or utility vehicle legally licensed to carry passengers.	Owned: <ul style="list-style-type: none"> <li>Full Licence document showing company / owner's information</li> <li>Licence document must be certified and not older than 3 months from the tender closing date.</li> </ul> OR Hired: <ul style="list-style-type: none"> <li>Proof of hiring contract / pre-approved letter from Bona Fide Vehicle Hire Companies must be submitted.</li> </ul> A tenderer is not allowed to hire from another Electrical construction Company.	Minimum owned or hired: 1  0: Fail 1: Pass	1:2% (min/max)
Outcome: For Mandatories Pass or Fail. For Functional weighted percentage score per item.			No 'Fail' result	Summation

## ■ Tools, Machinery & Equipment

Return Annexure D – Tools & Equipment Schedule which includes all items listed, indicating on the submission if the item is owned or being hired:

- If the item is being hired, then proof/evidence of hiring shall be required. This proof / evidence shall include a letter from a bona fide hiring company clearly stating the details of the items that are being hired (i.e., all items in the table or the specific items that are being hired) and the quantity available.
- The quantities of tools and equipment shall be stated in the letter. The letter issued will only be accepted if it is issued from a bona fide tool hiring companies or suppliers; letters from Construction Companies will not be accepted. The hiring letter shall be signed by the lessor (hiring company representative).

Eskom reserves the right to verify that the tools and equipment are in fact owned, hired and are available. Should it be found that the tools and equipment are found not to comply with the requirements stated in this document, the scoring will be revised accordingly.

All the requirements needed to pass the mandatory stage is listed Table 4.

# Mandatory Evaluation Phase: Tools, Machinery & Equipment

No	Tool /Equipment Description	Required Returnable Evidence	Mandatory Requirement	Functional Evaluation (Weighted Score - max per item)
<b>A</b>	<b>Data tools</b>			
<b>1</b>	GPS coordinate capturing device with 1-3m accuracy. Copy of user manual/section indicating accuracy	If hired: Proof of hiring contract / pre-approved letter from Bona Fide Hire Companies must be submitted.  A tenderer is not allowed to hire from another Electrical construction Company.	1	0.77%
<b>2</b>	Image capturing device with Min 5MP		1	0.77%
<b>3</b>	Smart cell phone		1	0.77%
<b>B</b>	<b>Hand Tools</b>			
<b>1</b>	Hex Crimping Tool LV	If hired: Proof of hiring contract / pre-approved letter from Bona Fide Hire Companies must be submitted.  A tenderer is not allowed to hire from another Electrical construction Company.	1	0.77%
<b>2</b>	General Construction Tool Set (Complete set) (Picks, Spades, Shovels, Wheelbarrows, Builder's Bucket)		1	0.77%
<b>3</b>	Full set of 1000V insulated hand tools		1	0.77%
<b>4</b>	Straight Level 1.2m minimum		1	0.77%
<b>5</b>	Steel Banding Tool (Buckle straps)		1	0.77%
<b>6</b>	Toolbox with general tools Spanners (10-40), Screwdrivers (full range), Hacksaw, hammer, Sockets (all relevant sizes), wire brush, utility knife, file, caulking gun, Pliers, cutters, Tape measures various lengths (5m; 100m), Various Saws, Angle Grinders, Handheld Drills (Various Types), etc.		1	0.77%
<b>C</b>	<b>Climbing Tools</b>			
<b>1</b>	Climbing shoes (pairs) / Fibreglass ladders (12m) Ladders shall comply with the requirements as per 240-128570305 Minimum Requirements for Portable Conductive and Non-Conductive Ladders Used in Eskom.	If hired: Proof of hiring contract / pre-approved letter from Bona Fide Hire Companies must be submitted.  A tenderer is not allowed to hire from another Electrical construction Company.	1	0.77%

# Mandatory Evaluation Phase: Tools, Machinery & Equipment

No	Tool /Equipment Description	Required Returnable Evidence	Mandatory Requirement	Functional Evaluation (Weighted Score - max per item)
<b>D</b>	Machinery			
<b>1</b>	Hand drilling machine	If hired:	1	0.77%
<b>2</b>	Compactor mechanical/hand	Proof of hiring contract / pre-approved letter from Bona Fide Hire Companies must be submitted. A tenderer is not allowed to hire from another Electrical construction Company.	1	0.77%

# Mandatory Evaluation Phase: Tools, Machinery & Equipment



No	Tool /Equipment Description	Required Returnable Evidence	Mandatory Requirement	Functional Evaluation (Weighted Score - max per item)
E	Measuring, Testing and Earthing Equipment			
1	Two Pole Voltage Tester Functions can be combined in single tool. Submit copy of user manual with applicable functions clearly marked. Shall meet the requirements according to 240-170000998 USE AND CARE OF PORTABLE LOW VOLTAGE ELECTRICAL TEST AND MEASURING INSTRUMENTS FOR OPERATING	If hired: Proof of hiring contract / pre-approved letter from Bona Fide Hire Companies must be submitted. A tenderer is not allowed to hire from another Electrical construction Company.	1	0.77%
2	Clamp on meter (range 1A to 100 Amp)		1	0.77%
3	Multi-meter		1	0.77%
4	Proximity tester		1	0.77%
5	Insulation Tester Functions can be combined in single tool. Submit copy of user manual with applicable functions clearly marked. Shall meet the requirements according to 240-170000998 USE AND CARE OF PORTABLE LOW VOLTAGE ELECTRICAL TEST AND MEASURING INSTRUMENTS FOR OPERATING		1	0.77%
6	Polarity Tester (plugs into a socket outlet) Functions can be combined in single tool. Submit copy of user manual with applicable functions clearly marked. Shall meet the requirements according to 240-170000998 USE AND CARE OF PORTABLE LOW VOLTAGE ELECTRICAL TEST AND MEASURING INSTRUMENTS FOR OPERATING		1	0.77%
7	Earth Loop Impedance Tester Functions can be combined in single tool. Submit copy of user manual with applicable functions clearly marked. Shall meet the requirements according to 240-170000998 USE AND CARE OF PORTABLE LOW VOLTAGE ELECTRICAL TEST AND MEASURING INSTRUMENTS FOR OPERATING		1	0.77%
8	Earth leakage tester Functions can be combined in single tool. Submit copy of user manual with applicable functions clearly marked. Shall meet the requirements according to 240-170000998 USE AND CARE OF PORTABLE LOW VOLTAGE ELECTRICAL TEST AND MEASURING INSTRUMENTS FOR OPERATING		1	0.77%
9	Metering installation and accuracy verification tester (e.g. KoCos Metes 32 or similar)		1	0.77%





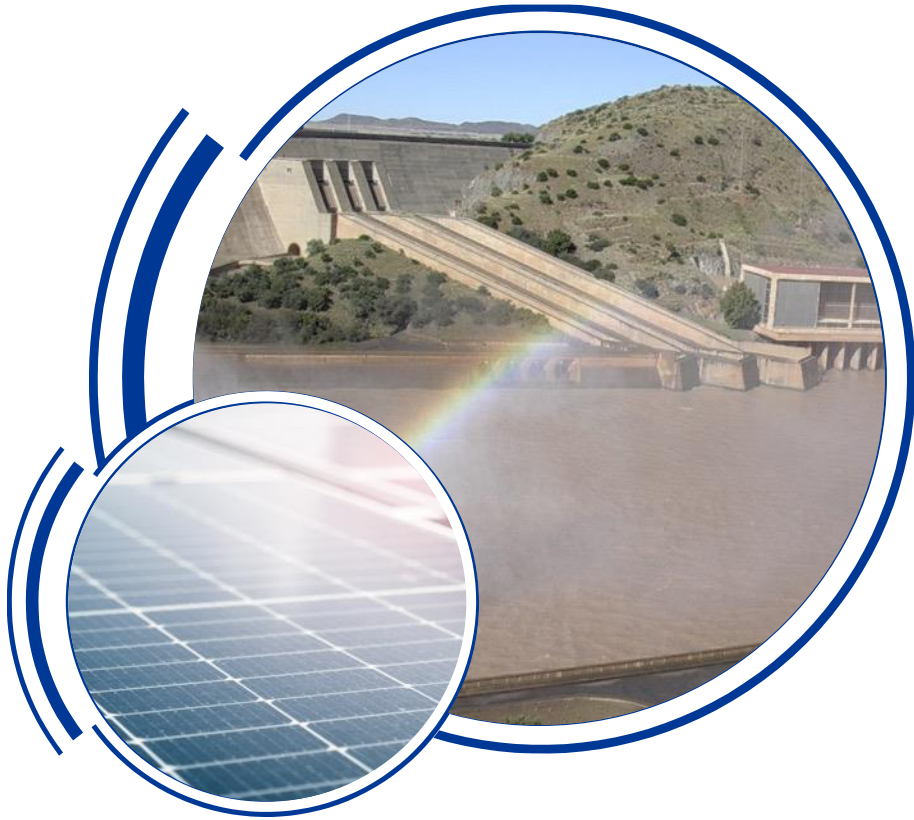
# Mandatory Evaluation Phase: Tools, Machinery & Equipment

No	Tool /Equipment Description	Required Returnable Evidence	Mandatory Requirement	Functional Evaluation (Weighted Score - max per item)
<b>F</b>	Safety Equipment			
<b>1</b>	PPE (Work wear, Safety shoes & hard hat)	To be owned only	1	0.77%
<b>2</b>	Fall Arrestor System (FAS Belts)		1	0.77%
<b>3</b>	FAS Rescue		1	0.77%
<b>4</b>	1000V gloves		1	0.77%
<b>5</b>	1000V Face shield		1	0.77%

- Functional Requirements assessments are only performed on submissions who successfully met every requirement, stipulated as part of the Mandatory Requirements assessment. The outcome of the Functional Criteria assessment is score based. Points are awarded for each functional requirement, in line with the level of compliance demonstrated.
- The functional criteria will consist of three main sections and each section will be weighted in their contribution to the final score as follows:
  - Skills Resources: 60%
  - Vehicles: 20%
  - Tools, Machinery & Equipment: 20%

- Table 5 lists the Contractual requirements that may be submitted by the tenderer post the tender closing date. Please note that these requirements will not form part of the desktop evaluation but will be validated on or before the contract award stage. It should be noted that failure to submit these requirements will delay the contract award / signing process for tenderer/s involved.
- NOTE: The successful contractors will be required to submit the documentation as soon as possible and no later than six (6) months from the date they are notified that they are successful.

Item	Description	Evidence Required
1.	LV Authorised Person (Outcome 3)	Valid authorisation document for the applicable area of work for each person listed as such in the Skills resource schedule
2.	Calibration certificates	Valid calibration certificates for all equipment that needs to be calibrated
3	Level 2 Meter Worker Certification	Valid certification document for all the meter workers listed as such in the Skills resource schedule



## Conclusion