

Title: **TECHNICAL EVALUATION  
CRITERIA FOR VARIOUS  
PRODUCTION TOOLS**

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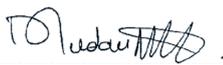
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## **1. Introduction**

This document establishes the standard technical evaluation criteria to be used when evaluating the submissions by prospective suppliers in response to formal Commercial Enquiries issued for Eskom various production tools used on networks within Eskom Distribution.

This document details the technical strategy, method of evaluation and the evaluation criteria, which includes the Enquiry returnable necessary to conduct the desktop evaluation,

There are numerous and various production tools items published on the Eskom Buyer's Guide drawings, and some are not on buyer's guide, each with unique standards and testing requirements. The intention of this document is to set-out the generic process to be complied across the array of items that are the object of the formal open enquiry, and the specific requirements shall be stated in the Technical Schedules related to the specified item.

## **2. Supporting clauses**

### **2.1 Scope**

This document encompasses the evaluation strategy and criteria for various items of Eskom Various production tools used on power networks within Eskom Distribution. It does not specify the requirements of each item as the specific requirements for the items are contained within the Technical Schedules that are attached to the respective Commercial Enquiries. This document covers only the evaluation strategy and criteria for various production tools used on networks within Eskom Distribution. It does not specify the technical requirements of each item. The Eskom standard requirements, including test requirements, will be stipulated in the tender pack, and may include Eskom standards, SANS standards and other National and International standards if applicable. A Technical Tender Pack folder (with technical schedules) will be published along with this complete report. The Tender Pack Version is an extract of the tender strategy and criteria relevant to temarket, excluding Eskom specific information relevant to the Cross Functional Team and Technical Evaluation Team. The tender pack version is to be included to the tender documents, and not this full report.

#### **2.1.1 Purpose**

The purpose of this document is to standardize the technical strategy and evaluation criteria for application during formal Commercial Enquiry processes for Eskom Various production tools in alignment with Eskom Holdings SOC (Ltd) policies.

#### **2.1.2 Applicability**

This document shall apply throughout Gauteng Cluster of Eskom Holdings Limited when formal Commercial processes are undertaken for various production tools.

## **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] ISO 9001, Quality Management Systems.
- [2] 32-1034 - Eskom Procurement And Supply Chain Management Procedure
- [3] 240-48929482 rev 1 - Tender Engineering Evaluation Procedure
- [4] 240-51757553 - Provide Engineering during Project Sourcing

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- [5] SANS IEC 61284 - Overhead lines - Requirements and tests for fittings
- [6] 240-75883154 - Current Carrying Compression Fittings for Overhead Sub-Transmission Systems
- [7] D-DT 2000series, 3000 series, 6000 series, 7000 series and 8000 series

**2.2.2 Informative**

None

**2.3 Definitions**

**2.3.1 General**

Definition	Description
<b>Buyer's Guide</b>	A list or catalogue of SAP numbers and associated material descriptions.
<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, to be submitted as part of the tender submission.
<b>Eskom Assessment Representative(s)</b>	The person(s) appointed by Eskom to perform evaluation of tendersubmission(s) in line with Eskom requirements.
<b>Eskom Various production tools</b>	Hardware components and assemblies used for the construction of powersystems and substations.
<b>Functionality</b>	The capability and capacity of a tenderer to provide goods or services in accordance with specifications as set out in the enquiry documents. Tendersevaluated on functionality must be carried out in accordance with 32-1034.
<b>Informal Tender</b>	It is the Procurement mechanism that may be used for transactions not exceeding the Informal Tendering lower limit as set in the Eskom DOA Policy. These transactions must be executed by a Procurement Practitioner and approved by an accredited Procurement Practitioner
<b>Informative Reference</b>	Represents documents that are used as additional information or usefulinformation that relates to this document.
<b>Mandatory Requirements</b>	These are requirements that must be submitted by the tenderer, fail to provide any mandatory tender returnable as clearly specified in the tender enquiry, thetender submission will be deemed non-responsive.
<b>Non-returnable</b>	May not be returned to the tenderer.
<b>Procurement</b>	Procurement is the process which creates, manages and fulfils contracts relating to the provision of goods, services and engineering and constructionworks or disposals, or any combination thereof.
<b>Schedule A</b>	Minimum requirements stipulated by the purchaser i.e., Eskom
<b>Schedule B</b>	Offered by the manufacture in response to purchaser's requirements
<b>Standard</b>	A document established by consensus to provide rules, limits, dimensions, tolerances or other characteristics for activities or their results, for common andrepeated use. A standard is aimed at the achievement of the optimum degree of order in each context. Compliance with a Standard is mandatory in its area of applicability
<b>Standards Implementation</b>	Is the department that is responsible for the implementation of standards and for the equipment's Technology at an OU level.

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Definition	Description
<b>Supplier</b>	Means a current or potential Supplier, vendor, contractor, consultant, or service provider. Suppliers may include Tenderers that are the OEM or redistributors.
<b>Tenderer</b>	A manufacturer or supplier who wishes to bid on the listed tender.
<b>Type tests</b>	It is defined as an element of conformity assessment, and known as compliance testing, or type testing — is testing or other activities that determine whether a process, product, or service complies with the requirements of a specification, technical standard, contract, or regulation. They are done or when the raw material changes.

### 2.3.2 Disclosure classification

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

## 2.4 Abbreviations

Abbreviation	Description
<b>DT</b>	Distribution technology
<b>DTI</b>	Department of Trade and Industry
<b>DWG</b>	Drawing
<b>FAS</b>	Fall Arrest System
<b>h</b>	Hour
<b>IEC</b>	International Electrotechnical Commission
<b>ILAC</b>	International Laboratories Accreditation Cooperation
<b>MPa</b>	Mega Pascal
<b>NEC</b>	New Engineering Contract
<b>NRS</b>	National Rationalized Specifications
<b>OEM</b>	Original Equipment Manufacturer
<b>RFQ</b>	Request for Quotation
<b>SANS</b>	South African National standards
<b>SAP</b>	Systems Application Processes
<b>SI</b>	Standards Implementation
<b>TET</b>	Technical Evaluation Team

## 2.5 Roles and responsibilities

Tenderer

All the Eskom employees and/or appointed bodies involved in the technical tender evaluations for Eskom Various production tools shall make use of this document, and reference 32-1034 and 240-48929482 when preparing the technical documentation for the commercial process, as well as during the execution of technical tender evaluations for these products.

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## **Procurement**

To ensure that the latest version of this document is used and technical (Standards Implementation department) is engaged where required.

## **2.6 Process for monitoring**

This document is applicable to current initiatives related to the procurement of Eskom Various production tools for Distribution networks. The document shall be monitored to ensure alignment with the documents as stated in the Normative References.

## **2.7 Related/supporting documents**

None

## **3. Technical Tender Strategy and Criteria**

### **3.1 Technical Tender Enquiry Strategy**

The tenderer shall receive the document pack and indicate which sap numbers are tendered for on the Material Consolidation. The evaluation criteria will be used to measure the supplier's ability to supply Eskom with various production tools for Distribution Systems in compliance with the specific requirements as stated in Eskom's Standards, Eskom's Buyer's Guide Documents, South African National Standards, International Standards (if there is no South African Standard available) and specific user stipulations, as included in the Commercial strategy.

This will be achieved by conducting the desktop evaluation of a specified enquiry returnable.

Suppliers who are tendering but are not the OEM of the product must source the required technical returnable from the OEM where relevant. Missing information will not be requested after the Enquiry closing date.

If any part or sub-component of the production process is outsourced, the Supplier shall retain full and complete accountability for the (entire) product.

**Note 1:** Eskom Distribution systems hardware items are allocated a specific designation by the Department of Trade and Industry (DTI) which is included in the Commercial section of the enquiry.

**Note 2:** The Cross Functional Team is required to consider, per item included in the scope, the options of sourcing from the OEMs, or if Suppliers are sourcing from redistributors may be considered with the manufacturer clearly stated on schedule A and B, and this requirement must be clearly stated in the Commercial Strategy documentation.

#### **3.1.1 Technical Evaluation Team Strategy**

The submissions shall be subjected to a progressive series of evaluation levels. Passing of each level is a prerequisite for proceeding to the next evaluation level.

The evaluation levels are as follows:

- Level 1 Mandatory Technical Criteria Evaluation
- Level 2 Functional (Scoring) Criteria Evaluation

### 3.1.2 Technical Tender Evaluation Strategy

The desktop evaluation will require the submission of evidence demonstrating compliance to the Mandatory Technical Criteria. This will be known as the **Level 1 Mandatory Criteria**. This aspect of the desktop assessment determines if the requirement as set for the mandatory tender returnable has been met, by assessing if all the mandatory documentation is included in the submission. The content of the document is not scrutinized at this level. This level is a test of responsiveness.

- Submissions fully complying to the Level 1 requirements will proceed to the next level of the technical evaluation.
- Tenderers are required to complete and submit the production tools list which will serve as a checklist that indicates categories tenderers has tendered for (complete/tick on column G,H &I).
- Submissions failing to fully comply to the Level 1 requirements will be deemed non-responsive(non-compliant); the submission will be disqualified and not evaluated further.

**Table 1: Mandatory Technical Returnable**

All evidence stated below must be included in the tender returnable for the submission to be considered complete. All returns must be submitted at tender closing and cannot be requested or submitted after tender closing.			
No	Criteria	Mandatory	Returnable (Evidence)
1	Provide the list of production tools which you are intending to supply. See list of production tools which consist of categories, description, SAP stock no, SAP short description, SAP purchase description from the document named Gauteng_Production Tool List Tender-Main NEW_220725 Final, put a yes/no on the column Tendered for.	Y/N	The submitted list must have column names such as category, description and stock number. On the spreadsheet provided you must respond by yes/no to indicate items that you are intending to tender for, it must be noted that if you have not indicated with a Yes/No, it will be deemed as a "No" for items where you have not indicated with either a Yes/No.

2	Submit fully completed technical schedules A & B of the items you intend to supply.	Y/N	Submit all production tools technical schedules A & B of all items on the list as per mandatory question 1.
	Product acceptance by SANAS Accredited or any approved international standard.	Y/N	Indicate if the products are SANAs accredited or not.
3	Submit more than 50% of the categories	Y/N	Submit 50% or more of the categories that is tendered for.

This forms **Level 2 Functional (Scoring) Criteria**, . This aspect of the desktop assessment determines the compliance of the submission to specific technical criteria, by evaluating the content of the technical tender returnable.

- The technical criteria set for Level 2 (Table 2,3 and 4) shall be allocated score out of 100%. Final scores shall be stated in percentage terms.

**Table 2: Summary of Evaluation Results per Category**

Item	Description	Weight Score
1.	Number of categories tendered for. 100%	100%
2.	Number of categories tendered for between 70% up to 99%	70%
3.	Number of categories tendered for between 50% up to 69%	50%
4	Number of categories tendered for less than 50%	0%
Table 2 total score		

**Table 3: Schedule A and B evaluation per Sap Number or per Non-Sap number item per Category**

Item	Description	Weight Score
1.	No deviations	100%
2.	Less than 10% deviations	80%
3.	Deviations more than 10% and less than 30%	40%
4.	Deviations more than 30%	0%
Table 3 total score		

**Table 4: Evaluation Results for Experience**

Item No.	Description	Number of PO's	Scoring
1.	Number of purchase orders done in the past four years	6 and above	100%
2.	Number of purchase orders done in the past four years	3 to 5	50%
3.	Number of purchase orders done in the past four years	Less than 3	0%

**Table 5: Summary of Technical Tender Process**

Level	Level Description	Threshold	Acquired Scoring Pass/Fail	Outcomes
1	Mandatory Criteria	100%	Pass/Fail	<ul style="list-style-type: none"> <li>Submissions meeting 100% - will proceed to the next level.</li> <li>Submissions failing to meet 100% - deemed non-responsive; the submission will be disqualified and not evaluated further.</li> </ul>
2	Functional Scoring criteria for Table 2,3 , 4	70%		<ul style="list-style-type: none"> <li>The average of the scores for Table 2,3 and 4 will be the score awarded for this section of evaluation.</li> <li>Submissions failing to meet 70% average for Level 2 evaluation will be taken as not meeting the requirements.</li> </ul>

The functionality threshold is 70% tenderers not meeting the threshold will not be evaluated further on price and BBEE.

Compliance to the technical standards included in the criteria is critical, due to the high risk introduced by non-compliance. Eskom Distribution systems hardware items are considered high risk items, meaning that when component failure occurs, serious harm, injury or death may be caused to the public, animals or the environment. It also places the network at risk and could adversely affect both the performance as well as continuity of supply.

## **3.2 Technical Tender Criteria and Returnable**

It is preferred that the technical returnable be contained within the technical section of the submission.

### **3.2.1 Technical Requirements**

#### **3.2.1.1 Technical Compliance Criteria**

Products offered during the Commercial tender process and supplied to Eskom subsequent to the contract awarding process must comply with the latest revision all relevant standards.

The technical team shall provide a comprehensive listing of the relevant standards, in relation to the SAP items included in the scope of the Commercial enquiry.

#### **3.2.1.2 Technical Tender Document Pack**

The Technical Tender Documents must be consolidated and confirmed by the Technical Evaluation Team and will form part of the Enquiry Documentation. The Technical Tender Document Pack shall contain (as a minimum requirement):

1. The material group tender package (edited as needed by the TechnicalEvaluation Team)
  2. The tenderer must save all the technical schedules per item on the folder captioned with buyers guide drawing number in documents provided.
  3. The soft copies in number 2 must be submitted through the memory stick.
- The list of documents as per 3.2.1.1, in the format supplied in an excel and or pdf format.
  - Copies of Eskom documents listed as relevant to Technical Compliance Criteria as per 3.2.1.1

- **Important Note:** No SANS, International Standards or other documents shall be included in the Technical Tender Document Pack. This is due to the strict licensing rules applied to Eskom's access to external standards. It is the responsibility of the Supplier to obtain access to these documents when required.
- The Technical A&B Schedules (complete with the A&B Schedule worksheet, the Deviation Schedule worksheet and the Test Report Schedule worksheet) are contained as separate documents..

The details included to the technical requirement must include the following:

- Bidder name
- SAP number where applicable
- Deviation
- Statement of acceptance of the deviation
- Limits to the acceptance, if any
- Terms/Conditions of acceptance, if any

### **3.3 Technical Tender Documentation**

The Criteria tables contained throughout section 3.2 shall be converted into evaluation sheets by the Technical Evaluation Team for the purpose of conducting the evaluations and for creating a record of the evaluation conducted per submission, per evaluator.

The Technical Evaluation Team shall provide Commercial with a formal report containing the details of the technical outcome of the evaluations.

As per the PCM, the report may contain the following content:

- Details on the implementation of Tender Technical Evaluation Strategy
- List all tenders (Supplier's name, etc.) received and evaluated
- Summary of all clarification questions and responses received
- Summary of evaluation results
- Clarifications related to the product sample evaluation scoring
- Interpretation of evaluation results (mandatory and scoring criteria)
- Final conclusions and recommendations
- All individual scoring forms and consolidated results
- Minutes of all meetings during evaluation process (internal clarification sessions, Supplier clarification sessions, etc.)

The report must be signed and authorised by appropriate representatives.

#### 4. Authorization

This document has been seen and accepted by:

Name and surname	Designation
Xolisa Gabela	Zone manager
Mashangu Xivambu	Maintenance and Operations Manager

#### 5. Revisions

Date	Rev	Compiler	Remarks
March 2025	2	B Maseko	Removed: 1. Annexure A under mandatory
March 2025	1	B Maseko	First issue document

## 6. Development team

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

- B. Maseko
- X. Gabela
- M. Mudau

## 7. Acknowledgements

- Standard Implementation Manager, Brian Maseko for some content of 240-143804436

### Approval (Technical Evaluation Team):

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