

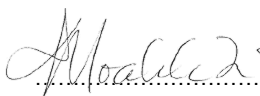
<p>Title: Technical Evaluation Criteria for Simmerpan Energy Performance Certificate Smart Meters Installation.</p>	<p>Unique Identifier: N/A</p> <p>Alternative Reference Number: N/A</p> <p>Area of Applicability: National Transmission Company of South Africa</p> <p>Documentation Type: Report</p> <p>Revision: 0</p> <p>Total Pages: 15</p> <p>Next Review Date: N/A</p> <p>Disclosure Classification: CONTROLLED DISCLOSURE</p>
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1. INTRODUCTION

This document covers the Technical Evaluation Criteria requirements both Mandatory and Technical Functional Requirements for the supply, delivery, off-loading, install, test and commission of three phase smart meters for the Simmerpan Energy Performance Certificates Smart Meters. This document sets out the evaluation criteria for smart metering systems for monitoring energy consumptions for Simmerpan buildings. This document defines the technical evaluation criteria that will be used to evaluate the enquiry for smart metering system.

2. SUPPORTING CLAUSES

2.1 SCOPE

This section contains the technical specification relating to the commercial enquiry for the technical requirements of the design, delivery, off-loading, testing, commissioning, handing over an approved working order and maintenance during the defect's liability period of the of site and related equipment. The *supplier* shall install, test and issue Certificate of Compliance, test certificates, operating and maintenance manual for Smart meters. *Contractor* is to ensure that Smart meters are type tested. *Supplier* shall ensure that all Low voltage cabling will be installed to supply data concentrate and terminated at the meter kiosk to power data concentrator and all building connected smart meter are hard wired to the building distribution board (DBs) per floor. Low voltage supplies will be fed from the Mini sub dedicated to a specific building and supply power to the Meter kiosk hosting data concentrator and Master Smart meter.

2.2 PURPOSE

This document provides evaluation criteria information for the commercial enquiry for the design, development, testing, acceptance, and supply of three phase smart meters, modems, Data Concentrators, Meter kiosk to effectively measure energy consumption for all the buildings over 1000 m² at NTCSA buildings for the purpose of attaining Energy Performance Certificate

2.3 APPLICABILITY

This document shall apply throughout NTCSA SOC Ltd.

2.4 NORMATIVE / INFORMATIVE REFERENCES

Parties using this document shall apply the most recent edition of the documents listed in the following paragraph below, see section 2.5.1.

2.4.1 Normative

- [1] 240-126910106 Particular requirements for a smart metering system
- [2] NRS049:2016 Advanced metering infrastructure requirement for smart metering system
- [3] SANS 1544 Energy Performance Certificates for Buildings
- [4] 240-48929482: Tender Technical Evaluation Procedure
- [5] SANS 10400- XA Building Occupancy classes.

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[6] EN 16247 Energy Audits – Part 1: General Requirements

[7] SANS 10142-1 The wiring of premises Part 1: Low Voltage Installations

[8] SANS 10400-A The application of the National Building Regulation – Part A

[9] 240-103031952 Application of Certificate of Compliance (CoC) and Safety Clearance Certificate on Electrical installations in Generating Power Plant Work Instruction.

[10] ISO 9001 Quality Management System

2.4.2 Informative

[1] ISO 9001 Quality Management System

[2] 240-53113685 Design Review Procedure

2.5 DEFINITIONS

Eskom evaluation team	The persons appointed by Eskom to perform the evaluation of tender submissions in line with Eskom's requirements.
Accredited body	Organization or facility that has been accredited by the relevant national body or by member of recognition arrangements of the international Laboratory Accreditation Cooperation (ILAC) or the International Accreditation Forum (IAF)
Submission	The tender returnable submitted by the tenderer in accordance with the requirements of the enquiry.
Tender Evaluator	End-users and technical experts nominated by the end-user and Divisional technical functionaries with the necessary technical expertise.
Tenderer	The person, firm or company, whether incorporate or not, who tenders for the work with a view to execute the works on contract.

2.6 ABBREVIATIONS

Abbreviation	Description
CoC	Certificate of Compliance
ILAC	International Laboratory Accreditation Cooperation
IAF	International Laboratory Accreditation Forum
DC	Direct Current

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2.7 ROLES AND RESPONSIBILITIES

This document defines the technical evaluation criteria that will be used by the NTCSA technical evaluation team for the evaluation of single and three phase smart meters, GSM modem, Data Concentrators, Meter Kiosk.

2.8 EVALUATION CRITERIA BREAKDOWN

The purpose of this evaluation criteria breakdown is to help the tenderer understand exactly what is required as deliverables for the Technical Evaluation. More on this will be explained during the clarification meeting.

Mandatory Requirements		Evidence Required
1	<p>Proof of Company Registration with Department of Labour.</p>	<p>Electrical Installation Regulation 6(1) states “No person may do electrical installation work as an electrical contractor unless that person is registered as an electrical contractor in terms of these Regulations.”</p> <p>Electrical Installation Regulation 6(2) states “Any person who does electrical installation work as an electrical contractor shall register annually in the form of Annexure 1 with the Chief Inspector or a person appointed by the Chief Inspector.”</p> <p>Electrical Installation Regulation 6(4)(b)</p> <p>The chief inspector or a person appointed by the chief inspector shall register any person referred to in regulation 6(1) as an electrical contractor and enter such registration into the national database: Provided that such person “employs a registered person in a full-time capacity or is himself or herself a registered person.”</p> <p>Electrical Installation Regulations 9(1) state No person other than a registered person may issue a certificate of compliance.</p> <p>9(2) states that “A registered person may issue a certificate of compliance accompanied by the required test report only after having satisfied himself or herself by means of an inspection and test that –</p> <p>(a) a new electrical installation complies with the provisions of</p>

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		<p>regulation 5(1) and was carried out under his or her general control.</p> <p>NB: Based on the regulations above, the registration of the company with the department of labour must bear the name of the company and the name and particulars of the person of which the company is registered with the department. Meaning this person is a full-time employee of the company if that person is not the owner of the company. Registrations bearing the name of an individual, will not be considered at all for evaluations and scoring.</p> <p>The document must be clear, legible, and not tampered with. Unclear, illegible, and tampered with copies will not be considered for scoring.</p>
2	Installation Electrician or Master Installation Electrician registration confirmation. (Single Phase Tester will NOT be considered at all)	The Tenderer must provide a copy of the Wireman's Licence copied on both sides. It must be clear, legible, and not tampered with. Unclear, illegible, and tampered with copies will not be considered for scoring.
3	Proof of Training for Site Supervisor/Registered Person and Artisans related to ORLVS by a SETA accredited institution.	The Tenderer must provide proof of training on Operating Regulations for Low Voltage Systems (ORLVS) to be able to do work on site Mini Substations. This confirmation of training must be valid at the close of tender and throughout the contract period. Invalid and expired training will not be considered at all.
Technical Requirements		Evidence Required
Company Profile, and experience and employee training and experience		
1	The tenderer to provide relevant experience and traceable references of previous work done in terms of Smart Meter Installations, Programming and Advanced Metering Infrastructure (AMI) system, which is used for energy and data management	For Full 5 points, the tenderer must provide 5 or more letters or completion certificates that are on the previous employer's letter head, bearing the duration of the contract or order, with traceable contacts. NTCSA reserves the right to follow up on the provided letters or completion certificates for confirmation of such contracts and or orders. Telephone contacts may not be only cell phone numbers, but a landline or both landline and cell phone number, including email address. The letters or completion certificates must be related

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		<p>to meter/smart meter installation, programming, and Advanced Metering Infrastructure (AMI) system, which is used for energy and data management.</p> <p>No other experience other than metering, programming, and Advanced Metering Infrastructure (AMI) system, which is used for energy and data management</p>
Key Staff		Evidence Required
1	<p><u>Site supervisor/Registered Person:</u></p> <p>At least a minimum of N4 with trade test and Installation Electrician/Master Installation Electrician. Proof of qualification, wireman licence and CV. (No Single-Phase Tester)</p> <p>Additionally, the Supervisor / Registered Person must have attended Low Voltage Regulations Training and be authorised to work on such equipment. (ORLVS)</p>	<p>The N4 Electrical Stream or higher qualification, relevant wireman's licence and CV indicating at least 7 years or more experience after registration as Installation or Master Installation Electrician will score 5 points. Lack of any of the Five (N4/Trade Test/Wireman's Licence/CV and ORLVS) will reduce the score. All qualification documents and copies of IDs must be certified, clear, legible, and not tampered with. Qualifications not certified with not be considered for scoring.</p> <p>The scoring will be looking at all the required qualifications (N4 Technical, Trade Test, Wireman's Licence, CV with relevant experience on Metering and programming and ORLVS). Lack of any of the mentioned qualification will result in the score being 0 or area not being scored)</p> <p>The Low Voltage Regulations (ORLVS) Training must still be valid and not expired at the time of close of Tender and must be valid throughout the contract period.</p> <p>Electrical Installation Regulation 9(2)(a) states</p> <p>(a) a new electrical installation complies with the provisions of regulation 5(1) and was carried out under his or her general control.</p> <p>Definition of General Control - "general control" in relation to electrical installation work that is being carried out, includes instruction, guidance, and supervision in respect of that work.</p>

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<p>2</p>	<p><u>Minimum of 2 x Artisans</u></p> <p>Electrical Trade Test qualification with minimum of N4. Proof of qualification and CV.</p> <p>Additionally, the Artisan must have attended Low Voltage Regulations Training and be authorised to work on such equipment. (ORLVS)</p>	<p>The N4 Electrical Stream or higher qualification, and CV indicating at least 7 years or more experience after qualification as an Electrician will score 5 points. Lack of any of the four (N4/Trade/and CV/ORLVS) will reduce the score. All qualification documents and copies of IDs must be certified, clear, legible, and not tampered with. Qualifications not certified with not be considered for scoring.</p> <p>The scoring will be looking at all the required qualifications (N4 Technical, Trade Test, CV with relevant experience on Metering and programming and ORLVS). Lack of any of the mentioned qualification will result in the score being 0 or area not being scored)</p> <p>The Low Voltage Regulations (ORLVS) Training must still be valid and not expired at the time of close of Tender and must be valid throughout the contract period.</p>
<p>Project execution Approach and Methodology</p>		<p>Evidence Required</p>
<p>1</p>	<p>The tenderer to provide a method statement and the structure of how work will be executed.</p>	<p>Fully defined method statement including risk identification and mitigation, detailed scope of work, resources requirements, program start and dates.</p> <p>These must include organograms with only names and details of people of which qualifications and CVs have been provided. Certified copies of IDs of everyone.</p> <p>The type of Tools that will be needed to carry out this work. Measuring Instruments or meters must be accompanied by valid and NOT expired calibration certificates in the name of the company at the close of tender. NTCSA will require that the calibration certificates are valid and not expired at the contract award stage and throughout the contract period.</p>

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2.8.1 Mandatory Criteria

Mandatory criteria (gatekeepers) are ‘must meet’ criteria that have been identified as such in the tender document. These criteria will not be point scored. Each tender will be assessed on a Yes/No basis as to whether or not the criteria are satisfactorily met. An assessment of ‘No’ against any criterion may eliminate the tenderer from further consideration.

2.8.2 Qualitative Evaluation Criteria

Compliant tenders will be evaluated against a set of weighted qualitative (i.e., non price) evaluation criteria. This scoring method shall be included in the contracting strategy and be consistent throughout all the disciplines.

The tenderer’s ability to satisfy the qualitative criteria will be assessed on the basis of scores allocated by the Evaluation Committee in response to questions relating to each criterion.

The scoring of tenders will be based on the degree of achievement by the tenderer of the requirements set out in the enquiry. A maximum score for each criterion will be awarded if the achievement of the criterion meets the employer’s requirements with no errors, risks, or weaknesses. The score will be reduced proportionate to the extent of non-conformities, discrepancies, errors, omissions, and risks. The reason for a tenderer scoring low or high values for specific criteria must be clearly stated in the comment’s column of the score sheet.

The extent to which a tenderer has complied with a requirement will be reflected by the numerical values as indicated in Table 1:

Score	Percentage/Weight	Description
5	100%	Meets Employer’s Requirements: no risks, weaknesses, or omissions.
4	80%	Meets Employer’s Requirements with qualifications. Some qualifications required from tenderer to eliminate the risks, weaknesses, and omissions.
3	60%	Marginally does not meet Employer’s Requirements: some minor risks, weaknesses or omissions which can be corrected or overcome with negotiation and minor cost impact.
2	40%	Substantially does not meet Employer’s Requirements: many risks, weaknesses which may be difficult to be correct or overcome and make acceptable.
1	20%	No achievement of Employer’s Requirements: existence of numerous errors, risks, weaknesses, or omissions which cannot be corrected.
0	0%	Totally deficient / non-responsive*

Table 1

2.9 PROCESS FOR MONITORING

Shall be monitored by Project Execution Stakeholders using Transmission PLCM process by the Project Manager and Procurement Officer Appointed.

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2.10 RELATED / SUPPORTING DOCUMENTS

Not Applicable

3. EVALUATION CRITERIA

Evaluations are performed to assess a supplier's capability to enter into a contract with Eskom. This report and any actions that are listed or recommended as a result of the assessment are by no means a confirmation or guarantee that any contract will be entered into with Eskom

Any actions undertaken by a supplier, because of this report, are for the supplier's account. Any liability for the said actions undertaken by the supplier is not transferrable to Eskom, in any way.

The evaluation team has no authority or responsibility in the decision taken by Eskom with respect to contracting for a product or services. Any statement, intentions, and/or actions expressed by the evaluation team during and after the assessment shall not be interpreted as the awarding of a contract and does not constitute any liability to Eskom regarding contract placement or post-contract performance guarantees.

The evaluation process has 2 Stages, namely:

- a) Stage 1 – Desktop Mandatory Criteria Evaluation.
- b) Stage 2 – Desktop Qualitative Technical Evaluation Criteria which requires $\geq 75\%$ compliance threshold.
- c) Stage 3 – Site visit for inspection and verification of business premises, tools, and vehicles among others. Only Tenderers who will have obtained $\geq 75\%$ compliance threshold will be eligible for this site visit.

3.1 STAGE 1 - DESKTOP MANDATORY EVALUATION CRITERIA

The Desktop Evaluation Criteria is Stage 1 of evaluation. Representatives will go through the details of the returnable submissions will ensure that the mandatory requirements are met. Non submission of any mandatory evaluation criteria may result in disqualification of the Tender and discontinue further evaluation.

3.2 STAGE 2 – DESKTOP TECHNICAL EVALUATION CRITERIA

The Stage 2 Qualitative Evaluation Criteria is a weighted evaluation criteria used to identify the highest technically ranked Tenderer after the Mandatory Evaluation Criteria have been met. This stage will be evaluated by the criteria stipulated in Table 3 below. The minimum weighted final score/ threshold required for a tenderer to be considered to progress to the next stage from a technical perspective is 75%.

3.3 STAGE 3 – SITE VISIT BY EMPLOYER

The Site Visit Stage will involve inspection and verification of the Tenderer's business premises, the trade tools, including business vehicles for compliance with the relevant rules and regulations. Only Tenderers who will have obtained $\geq 75\%$ of the Technical Evaluation Criteria compliance threshold will be eligible for this stage.

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Table 2: Stage 1 Mandatory Desktop Evaluation Criteria

Stage 1: Mandatory Desktop Evaluation Criteria		Meet (YES / NO)	Motivation & Comments
1	Proof of Company Registration with Department of Labour.		
2	Installation Electrician or Master Installation Electrician registration confirmation. (Single Phase Tester will NOT be considered at all)		
3	Proof of Training for Site Supervisor/Registered Person and Artisans related to ORLVS by a SETA accredited institution.		
Result <i>Note: Non submission of any mandatory evaluation criteria will result in disqualification of the Tender and discontinue further evaluation.</i>			

Table 3: Stage 2 Technical Evaluation Criteria

Technical Evaluation Criteria		Weight	Score (%)	Comments	What the evaluator must look for
1	Company and employee experience				
1.1	The tenderer to provide relevant experience and traceable references of previous work done in terms of Smart Meter Installations, Programming and Advanced Metering Infrastructure (AMI) system, which is used for energy and data management.	35%			5 - ≥ 5 references not older than 5 years. 4 - ≥ 4 references not older than 5 years. 3 - ≥ 3 references not older than 5 years. 2- ≥ 2 references not older than 5 years. 1 - < 2 references, and/or irrelevant experience, and/or older than 5 years.
2	Key staff				
2.1	<u>Site supervisor/Registered Person:</u> At least a minimum of N4 with trade test and Installation Electrician. Proof of qualification, wireman licence and CV. (No Single-Phase Tester) Additionally, the Supervisor / Registered Person must have attended Low Voltage Regulations Training and be authorised to work on such equipment. (ORLVS)	30%			5 - ≥ N4, Installation Electrician with 7 years or more relevant experience, Trade Test Certificate, ORLVS, and CV. 4 - ≥ N4, Installation Electrician with 5 - 6 years relevant experience, Trade Test Certificate, ORLVS, and CV. 3 - ≥ N4, Installation Electrician with 4 – 5 years relevant experience, Trade Test Certificate, ORLVS, and CV.

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Technical Evaluation Criteria		Weight	Score (%)	Comments	What the evaluator must look for
					<p>2 ≥ N4, Installation Electrician with 3 – 4 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p> <p>1 ≥ N4, Installation Electrician with 0 – 3 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p>
2.2	<p><u>Minimum of 2 x Artisans</u> Electrical Trade Test qualification with minimum of N4. Proof of qualification and CV.</p> <p>Additionally, the Artisans must have attended Low Voltage Regulations Training and be authorised to work on such equipment. (ORLVS)</p>	25%			<p>5 - ≥ N4, Electrician with 7 or more years relevant experience, Trade Test Certificate, ORLVS, and CV.</p> <p>4 - ≥ N4, Electrician with 5 - 6 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p> <p>3 - ≥ N4, Electrician with 4 – 5 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p> <p>2 ≥ N4, Electrician with 3 – 4 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p> <p>1 ≥ N4, Electrician with 0 – 3 years relevant experience, Trade Test Certificate, ORLVS, and CV.</p>
3	Project execution Approach and Methodology				
3.1	The tenderer to provide a method statement and the structure of how work will be executed.	10%			5- Fully defined method statement including risk identification and mitigation, detailed

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Technical Evaluation Criteria	Weight	Score (%)	Comments	What the evaluator must look for
				<p>scope of work, resources requirements, program start and dates.</p> <p>4- method statement not fully defined, at least 80% of components addressed, scope of works, resource requirements, risks and mitigations, project programme start and end dates.</p> <p>3 – at least 60% of the method statement components articulated. Some missing details.</p> <p>2- at least 40% of the method statement components articulated. Many missing details.</p> <p>1 – poorly articulated method statement or not submitted</p>
OVERALL WEGHT & SCORE FOR THIS TENDERER	100%			
CONTRACTOR/TENDERER SCORE				
Threshold ≥ 75%				

3.4 FINAL SCORE AND RANKING

Suppliers shall be ranked according to the weighted scores obtained in Tables 2: Desktop Evaluation Suppliers that receive a weighted score below 75% shall not be evaluated further.

This document has been seen and accepted by:

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4. REVISIONS

Date	Rev.	Compiler	Remarks
November 2024	0	L Moahloli	This is the first issue

5. DEVELOPMENT TEAM

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

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6. ACKNOWLEDGEMENTS

None