**Invitation to Tender**

**Provision of PR And Digital Services to The Financial Services Campaign, China**

**DN432928**

**Version**

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| --- | --- | --- |
| Version | Author | Date |
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**Approvals**

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|  |
|  | Our Reference: **DN432928** |
|  |
|  | Date: 30/08/2019 |

To Whom it May Concern,

**Invitation to Tender**

**Reference Number. DN432928**

You are invited to tender for the Provision PR And Digital Services to The Financial Services Campaign, China requirement in competition in accordance with the attached document. The Department for International Trade in China is looking to appoint one organisation for the provision of PR and Digital Services to our team based at the British Embassy in Beijing. The main duties of the Agency would be to create, consult and deliver on a PR and Digital strategy for the Financial Services Campaign, which is running in China from September 2019 to March 2020. The campaign will also have an advertising element supported by an existing media-buy agency.

1. The requirement and subsequent contract shall be for a period of 6 months. Funding has been approved. The maximum budget is £75,000 and is exempt from VAT.
2. This Procurement is being carried out in accordance with the Public Contract Regulations 2015 under the Open Tender procedure. Tenderers can submit a bid as a single legal entity, with other legal entities (to form a consortium) or with named sub-contractors.
3. The anticipated date for the contract award decision is 30/09/2019. Please note that this is an indicative date and may change.
4. The clarification period ends on 06/09/2019 at 12pm BST (7pm CST). You must submit your tender to arrive no later than 13/09/2019 at 12pm BST (7pm CST).

Yours faithfully,

Alistair Goldspink

Assistant Contract Manager

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# **SECTION 1: INTRODUCTION**

## Definitions[[1]](#footnote-1)

|  |  |
| --- | --- |
| TERM[[2]](#footnote-2) | MEANING |
| **“Authority”** | means the Secretary of State acting through the Department for International Trade acting as part of the Crown. |
| **“Contract”**  | means the contractually bindng terms and conditions set out in Appendix B of this ITT to be entered into by the Authority and the successful Tenderer at the conclusion of this Procurement. |
| **“Contract Deliverables”** | means the services and any associated technical data which the winning Tenderer is required to provide under the contract.  |
| **“Conflict of Interest (COI)"** | means any circumstance or situation where relevant staff members of the Tenderer invovled in this Procurement have, directly or indirectly, a financial, economic or other personal interest which might be percieved to compromise their impartiality and independence in the context of the Procurement and/or affect the intergrity of Contract Award and any resultant Contract. |
| **“EIR”** | means the Environmental Information Regulations 2004 (as amended) together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to those Regulations.  |
| **“FOIA”** | means the Freedom of Information Act 2000 (as amended) and any subordinate legislation made under that Act together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to that legislation. |
| **“Invitation to Tender (ITT)”**  | Means the document together with its attachements which the Authority sends out to potential Tenderers to initiate participation in the competition. |
| **“Specification of Requirement”** | Detail the technical requirements and acceptance criteria of the contract delvierables. |
| **“Tender”** | means the formal offer that the Tenderer makes to the Authority in response to this ITT. |
| **“Tenderer”** | means the economic operator or group of operators in the form of a consortium, icluding sub-contractors, who have been invited to submit a Response to this ITT. Where “You” is used this means an action on the Tenderer. |
| **UKFS** | UK Financial Services |
| **UKFPS** | UK Financial and Professional Services |

##  Part A: General

* 1. The purpose of this ITT is to invite Tenderers to propose a solution to meet the Authority’s requirement. This document explains and sets out the:
	2. Tender process and timetable for the stages of the procurement;
	3. Instructions and conditions that govern this competition;
	4. Information you must include in your Tender and the required format;
	5. Specification of Requirements;
	6. Arrangements for the receipt and evaluation of Tenders; and
	7. Contract Conditions that shall apply in the event that the Authority awards a contract following this competition.
	8. Tenderers acknowledge and agree that nothing contained within this ITT shall constitute an inducement or incentive nor shall have in any other way persuaded a Potential Supplier to submit a Tender or enter into any other contractual agreement.
	9. Tenderers are responsible for ensuring that they understand the requirements for this procurement. If any information is unclear or if a Tenderer considers that insufficient information has been provided, Tenderers should raise a clarification with the Authority in accordance with Section 3 Part I to this ITT.
	10. Tenderers are responsible for ensuring that they have submitted a complete and accurate Tender and that prices quoted are arithmetically correct for the units stated.

## Part B: Disclaimer

* 1. Whilst the information contained in this ITT and any supporting information referred to herein or provided to Tenderers by the Authority have been prepared in good faith. The Authority does not warrant that this information is comprehensive or that is has been independently verified. Neither the Authority not its representatives accepts any liability for the information contained in this ITT or shall be liable for any loss or damage arising as a result of this ITT.
	2. Any Tenderer considering entering into contractual relationships with the Authority should make its own investigations and independent assessment of the Authority.

## Part C: Contract Conditions

* 1. The full text of the Contract conditions is attached at Schedule 07 to this ITT.

## Part D: Tender Expenses

* 1. The Tenderer shall bear all costs associated with preparing and submitting your Tender. If the Tender process is terminated or amended by the Authority, the Authority shall not reimburse you.

## Part E: E-Tendering

* 1. The Authority is using e-Tendering for this Procurement. ProContract is the Authority’s e-Tendering Platform. It can be accessed via your web browser at <https://procontract.due-north.com/>. If there is any conflict between the information set out in this ITT and associated documents and the information displayed in the Authority’s e-Tendering Platform (ProContract), the information set out in this ITT shall take precedence.
	2. Unless otherwise stated in this ITT or in writing by the Authority, all communications from Tenderers and the Authority during the Procurement must be made using the Authority’s e-Tendering Platform (ProContract). The Authority shall not respond to communications made by other means and Tenderers should not rely on communications from the Authority unless they are made through the Authority’s e-Tendering Platform (ProContract).
	3. If a Tenderer experiences technical difficulty with the Authority’s e-Tendering Platform (ProContract), the Tenderers shall contact the e-Tendering Platform (ProContract) helpdesk. The Tenderer shall also inform the Authority.

# **SECTION 2: KEY DATES**

* 1. The key dates for this procurement are currently anticipated to be as follows.[[3]](#footnote-3)

|  |  |  |  |
| --- | --- | --- | --- |
| STAGE | DATE AND TIME | INITIATED BY | SUBMIT TO: |
| ITT Publication | 30/08/2019 | The Authority | All Tenderers |
| Deadline for Clarification Questions / Requests for additional informaiton. | 06/09/2019 at 12pm BST (7pm CST) | Tenderers | The Authority |
| ITT Submission Deadline | 13/09/2019 at 12pm BST (7pm CST) | Tenderers | The Authority |
| Tender Evaluation | 16/09/2019 to 20/09/2019 | The Authority | N/A |
| Contract Award | 23/09/2019 | The Authority | The Winning Tenderer |
| Contract Formation | 24/09/2019 to 07/10/2019 | The Authority | The Winning Tenderer |
| Contract Commencement | 30/09/2019 | The Winning Tenderer | N/A |

# **SECtION 3: TENDER PREPARATION AND SUBMISSION**

* 1. By submitting a Tender, Tenderers agree:
		+ to be bound and accept the terms and conditions set out in this ITT; and
		+ that if the Authority accepts the Tender in writing, the Tenderer shall execute the Contract in the form set out in Schedule 7.
	2. The Authority may withdraw, terminate or amend the Procurement or this ITT at any time. Any amendment to the Procurement or this ITT shall be notified in writing to Tenderers. The Authority shall reissue the procurement documents before the Tender Deadline and may, at its discretion or (where applicable) in accordance with the Public Contract Regulations 2015, extend the deadline for the submission of Responses and / or any other stages of the Procurement for amendments.

## PART A: Tenders for Selected Contract Deliverables

* 1. Tenderers must Tender for all the Contract Deliverables listed in the Specification of Requirements. The Authority reserves the right to reject Tenders where Tenderers have not tendered for all the Contract Deliverables.

## Part B: Construction of Tenders

* 1. The Tender must be written in English (UK) language with Arial 11-point font and 2.54cm margins (where applicable). The Tender and accompanying documents must be compatible with Microsoft Office Word and other Microsoft Office applications.

## Part C: Tender Validity

* 1. It is a condition of tendering that all Tenderers holds their tender open for acceptance for one hundred and twenty (120) calendar days from the ITT submission deadline.
	2. If successful, the winning Tender must be open for a further thirty (30) calendar days. This period starts on the day the Authority announces its decision to award the contract to the winning Tenderer in accordance with the Tender. In the event legal proceedings are instigated, challenging the award of the contract, prior to entry into contract, it is a condition of this ITT that the winning Tenderer holds their Tender open for acceptance during this period and up to fourteen (14) calendar days after the result of the legal proceedings

## Part D: Variant Tenders

* 1. A variant tender is a Tender that offers an alternative approach to, or method of, meeting the Authority’s requirements as set out in this ITT and associated documents. Where the tender evaluation has a pass/fail for the Contract Conditions the Authority may reject the Tender on the grounds of additional or alternative Contract Conditions.
	2. The Authority shall not accept or evaluate any Variant Tenders for this Procurement.

## Part E: Submission of Tender

* 1. Tenders must be uploaded onto Authority’s e-Tendering Platform (ProContract) by the time and date stated in the covering letter to this ITT and Schedule 5. The Authority reserves the right to reject any Tender received after the stated date and time.
	2. Tenderers must complete all parts of the response form in the Authority’s e-Tendering Platform (ProContract) in accordance with the instructions therein. Tenders shall be checked for completeness and only compliant responses shall be evaluated.
	3. Tenderers must not exceed stipulated page/word limits or include attachments not requested. The Authority shall disregard attachments which have not been requested any part of the Tender which goes beyond defined page/word limits.
	4. Samples are not required for this Procurement.
	5. The Tender shall be the single source of information used to evaluate Tenders. The Authority shall only take account of information which is specifically asked for in this ITT.

## Part F: Pricing

* 1. Prices must be submitted in £GBP, exclusive of VAT.
	2. The Contract shall be awarded as a fixed cost against deliverables and shall be paid according to the Specification of Requirements.
	3. The pricing schedule within the Authority’s e-Tendering Platform (ProContract) identifies the minimum level of information required.
	4. If the Authority believes that any element of pricing submitted is abnormally low it will conduct a further analysis of the offer in accordance with Regulation 69 of PCR 2015.
	5. The Authority reserves the right to seek verification of any prices that it deems to be unsustainable in respect of this Procurement.

3.19 The Authority reserves the right to treat any bid which is caveated by reference to the UK exiting the EU with a deal or without a deal as non-compliant and, as with any procurement exercise, a bidder in submitting its prices for evaluation does so in acceptance of all business risks and circumstances arising from time to time.

## Part G: Sub-Contracting

* 1. All information requested in the Tender should be given in respect of the Prime Contractor.
	2. Where the Tenderers propose to use sub-contractors to deliver some or all of the requirement, the Tenderer must complete the Tenderers Sub-Contracting Information Form at Schedule 1.
	3. The Authority recognises that arrangements in relation to sub-contracting may be subject to change and may not be finalised until a later date. The Tenderer shall inform the Authority immediately of any changes to the supply chain following Tender submission.

## Part H: Consortia

* 1. Where a Tenderer is submitting a Tender as part of a proposed consortium, the Tenderer must complete the Tenderers Consortium Information Form at Schedule 2.
	2. In accordance with Regulation 19(6) of PCR 2015, the Authority may require a successful consortium to form a separate corporate entity.
	3. All members of the consortium shall be required to provide the information required in the Tender as part of a single composite response to the Authority.
	4. The Authority recognises that arrangements in relation to a consortium may be subject to change and may not be finalised until a later date. Tenderers shall Tender on the basis of envisaged arrangements. The Tenderer shall inform the Authority immediately of any changed to the consortium following Tender submission.

## Part I: Clarifications

* 1. Tenderers may raise questions or seek clarification regarding any aspect of this Procurement prior to the clarification deadline (as set out in Section 3 Part I to this ITT). The Authority shall respond to all reasonable clarifications submitted prior to the clarification deadline as soon as possible but cannot guarantee a minimum response time.
	2. If a Tenderer believes that a clarification request is commercially sensitive or that publishing the clarification with the Authority’s response would reveal confidential information, disclosure of which would be detrimental to the Tenderer. The Tenderer must clearly state that the clarification is sensitive and provide a justification upon submission. If the Authority considers the clarification and response is not commercially sensitive or all Tenderers may benefit from its disclosure the Authority will notify the Tenderer. The Tenderer shall have two (2) working days of the notification to withdraw their clarification. If the clarification is not withdrawn the clarification request and Authority’s response will be published to all Tenderers.
	3. The Authority may not respond to a clarification or publish it where the Authority considers that the response may prejudice the Authority’s commercial interests. In such circumstances, the Authority will inform the Tenderer of its view.
	4. The Authority reserves the right (but is not obliged) to seek clarification of any aspect of a Tender and/or provide additional information during the evaluation phase in order to carry out a fair evaluation. Failure to respond within the timescales specified and/or to provide an adequate response to such a request may result in the Tender being rejected.

## Part J: Changes to Responses

* 1. Tenderers may modify their submitted Tenders at any time prior to the Tender submission deadline. Tenders submitted before the deadline shall remain unopened until the deadline or such time thereafter when all Tenders shall be opened together.
	2. Tenderers may withdraw their response at any time by submitted a notice via the Authority’s e-Tendering Platform (ProContract).

# **SECTION 4 – CONDITIONS OF TENDERING**

* 1. By issuing this Tender, communicating with a Tenderer or any other communication in respect of this Procurement, the Authority shall not be bound to accept any Tender or award any Contract. The Authority reserves the right to:
		+ 1. seek clarification of any aspect of a Tender and/or provide additional information in respect of Tenderers submission;
			2. disqualify any Tenderer that does not submit a compliant Tender in accordance with the instructions set out in this ITT;
			3. disqualify any Tenderer for the provision of false, inaccurate or misleading information;
			4. withdraw or terminate this ITT/Procurement at any time. Any withdrawal or termination shall be notified in writing to all Tenderers;
			5. choose not to award any contract as a result of the current Procurement;
			6. ask for an explanation of the costs or price proposed in the Tender where the Tender appears to be abnormally low.
	2. The contract shall be entered into when the Authority sends written notification of its entry into the contract.
	3. The Authority shall not provide any references in relation to Services received from any external organisation.

## Part A: Conforming to the Law

* 1. Tenderers must comply with the UK Competition Act 1998; the UK Bribery Act 2010, applicable EU and UK legislation and any equivalent legislation in a third state.
	2. Tenderers attention is drawn to legislation relating to the canvassing of a public official, collusive behaviour and bribery. If you act in breach of this legislation Tenderers may be disqualified from this Procurement. Disqualification will be without prejudice to an civil remedy available to the Authority or any criminal liability that your conduct may attract.
	3. Tenderers attention is drawn to the Agency Workers Regulations 2011. The Tenderer shall fully indemnify the Authority for any claims instituted in any court or tribunal, the legal costs of defending such claims and reimburse for any monetary awards given in regards to any actions brought under the Agency Workers Regulations 2011 against the Authority, by any agency worker engaged by the Tenderer to supply the Services to the Authority.
	4. The courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim that arises out of or in connection with this Procurement (including non-contractual disputes or claims).

## Part B: Intellectual Property Rights

* 1. The Tenderer grants the Agent an irrevocable, perpetual, non-exclusive license to copy, amend and reproduce any intellectual property contained within its Tender for the purposed of carrying out this Procurement; complying with the law and/or any government guidance; and/or carrying out the Agent’s business activities. This license shall also permit the Agent to sublicence the use of the Potential Supplier’s Tender to its advisers or sub-contractors for the same purpose.

## Part C: Changes to a Tenderers Circumstances

* 1. The Authority may:
		+ Reject a Tender if there is a subsequent change of identity, control, financial standing or other factor throughout any point during this Procurement;
		+ Revisit information contained in a Tender at any time to take account of subsequent changes to a Tenderers circumstances; or
		+ Require a Tenderer to certify that there has been no material change to the information submitted in their Tender at any point during this Procurement. Failure to do so, may result in the rejection of the Tender.

## Part D: Confidentiality

* 1. The contents of this ITT, associated documents or information provided by the Authority are provided on condition that they remain the property of the Authority and are kept confidential. The Tenderer shall take all necessary precautions to ensure that they remain confidential and are not disclosed, save as described below.
	2. Tenderers may disclose information relating to the Procurement to their advisers and sub-contractors in the following circumstances:
		+ disclosure is for the purpose of enabling a Tender to be submitted and the recipient of the information undertakes in writing to keep it confidential on the same terms as the Tenderer;
		+ the Authority gives prior consent in writing to the disclosure;
		+ the Tenderer is legally required to disclose the information.
	3. When providing details as part of a Tender, Tenderers agree to waive any contractual or other confidentiality rights and obligations associated with these contracts.
	4. The Authority reserves the right to, but is not obliged to, contact any named customer contact given as a reference or otherwise referred to as part of a Tender. The named customer contact does not owe the Authority any duty of care or have any legal liability, except for any deceitful or maliciously false statements of fact.
	5. Subject to Section 3 Part E to this ITT, the Authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact
	6. In addition to the provisions of Section 3 Part E to this ITT, Tenderers agree and acknowledge that the Authority may use third parties in the course of its evaluation of Tenders. The Authority may disclose information contained therein to such third parties for the purposes of the Authority’s Tender Evaluation

## Part E: Publicity Announcements, Transparency, Freedom of Information and Environmental Regulations

* 1. Tenderers acknowledge there may be circumstances in accordance with the FIOA and the EIR, the Authority may be required to disclose information submitted to it by a Tenderer in addition to any other transparency obligation identified within this ITT. If a Tenderer considers any information to be commercially sensitive or of a confidential nature, then Tenderers must complete the Tenderers Commercially Sensitive Information Form (Schedule 03). The Authority will, where practicable, consult the Tenderer before publishing or disclosing information under the FOIA and/or the EIR to establish whether an exemption may apply.
	2. If a Tenderer receives a request for information relating to this Procurement under the FOIA or the EIR during the Procurement, this should be immediately passed on to the Authority and the Tenderer should not respond to the request without first consulting the Authority.
	3. Tenderers must be aware that the Authority shall publish notification of the contract and shall publish the contents of any resultant contract. Before publishing the contract, the Authority shall redact any information which is exempt from disclosure under the FIOA and/or the EIR. Information exempt from publication could include information which would hinder law enforcement; would otherwise be contrary to the public interest or would prejudice the legitimate commercial interest of any person.
	4. No Tenderer shall undertake any publicity activities in relation to this Procurement without the prior written agreement of the Authority, including the format and content of any publicity. Tenderers should not, before the Authority has announced the outcome of the Procurement, disclose or make any statement, which confirms that they have submitted a Tender for this Procurement.
	5. Under no circumstances should Tenderers confirm to any Third Party the Authority’s acceptance of an offer of contract prior to either information the Authority of your acceptance or the Authority’s announcement of the award of contract, whichever occurs first.
	6. All Central Government Departments, their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement, including ensuring value for money and related aspects of good procurement practice. For these purposes, the Authority may disclose within Government any of the Tenderer’s documents and information (including any that the Tenderer considers to be confidential and/or commercially sensitive) provided in its Tender. The information will not be disclosed outside Government during the Procurement. Tenderers consent to these terms as part of the Procurement.

## Part F: Conflict of Interest

* 1. You must inform the Authority immediately of any conflict of interest (COI) that have arisen or that arise at any point during this Procurement. Tenderers must remain alert to COI and update the Authority if any new circumstance or information arises or changes. Failure to do so and/or manage COI effectively may result in a Tenderers disqualification.
	2. Where there is an existing or potential COI Tenderers must include a proposed statement with their Tender detailing how the COI will be managed. As a minimum Tenderers COI statements must include:
		+ 1. Details of the COI;
			2. Roles and responsibilities;
			3. Standards for integrity and fair dealing;
			4. Levels of access to and protection of competition sensitive information
			5. Confidentiality/Non-Disclosure Agreements
			6. The Authority’s rights of audit; and
			7. Physical and managerial separation.

In the event a Tender is accepted, any COI Statements shall become part of the Contract and shall be legally binding.

## Part G: Standstill

* 1. The Authority is obliged under certain circumstance to allow a space of ten (10) calendar days between the date of dispatch of notice to Tenderers before entering into a contract, known as the standstill period. The standstill period ends at midnight at the end of the 10th day after the date the contract award notification letters have been issued. Where this is not a working day, this will extend to midnight at the end of the next working day. The standstill period shall not apply to this Tender.

## Part H: Cyber Essentials

* 1. The Cyber Essentials Scheme (CES) has been a mandatory requirement for suppliers with contracts involving sensitive or personal information since 01 October 2014. Tenderers can view details of CES at <https://www.gov.uk/government/publications/cyber-essentials-scheme-overview>. Suppliers shall hold Cyber Essentials Certification as a minimum on all Government Contracts awarded which include in the transfer of identifiable data/information.
	2. The Authority has conducted a Cyber Risk Assessment to identify the level of cyber risk to this requirement. It has been identified that no specific cyber essentials certification is required, but it is the Authority’s preference that all Suppliers as a minimum hold Cyber Essentials as a minimum.
	3. Where the Prime Contractor intends to sub-contract any part of the requirement, the level of cyber risk identified must be transferred through the supply chain. No sub-contract can be awarded until it has demonstrated to the Prime Contractor that it has met the minimum standards required.

## Part I: Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE)

* 1. Tenderers should determine whether they believe the TUPE applies to this Procurement. Notwithstanding this, Tenderers will note that it is the Authority’s view that TUPE is not likely to apply if this Procurement results in a contract being awarded, although the Authority is not liable for this opinion. The Authority’s view is based on the fact that this is a new requirement.
	2. It is the responsibility of Tenderer to take their own advice and consider whether TUPE is likely to apply in the particular circumstances of the Contract and to act accordingly. The Tenderer is encouraged to carry out its own due diligence exercise.
	3. If Tenderers have a contrary view to that of the Authority on the applicability of TUPE they should advise the Authority, giving reasons, prior to the deadline for Tenders

# **SECTION 5 – TENDER EVALUATION**

## Part A: Tender Evaluation Criteria

* 1. Tenders shall be evaluated by a panel appointed by the Authority. Each panel member shall undertake an independent evaluation. There shall be a minimum of two (2) commercial officers evaluating the commercial and price criteria and a minimum of three (3) technical experts evaluating the technical criteria. Once complete, a moderation meeting shall be held where the panel shall reach a consensus on the results.
	2. Tenders shall be evaluated using the Most Economically advantageous Tender (MEAT) methodology. This is where the Authority assesses a Tender based on a combination of commercial, technical and price elements. The Authority shall award the Contract to the Tenderer which submits the highest scoring response.
	3. The MEAT ratio for this Tender is as follows:

|  |  |
| --- | --- |
| **Award Criteria** | **Weighting** |
| Commercial | Pass/Fail |
| Technical | 70% |
| Price | 30% |

* 1. Any mandatory elements shall be evaluated as pass / fail and any non-mandatory elements shall be given a weighting. For weighted commercial and technical elements, the following scoring methodology shall be applicable. Weighing values indicate the relative importance of the question in the overall evaluation. Tenderers must score a mark of three (3) or above against each weighted element.

|  |  |  |
| --- | --- | --- |
| **Score** | **Quality** | **Description** |
| 0 | No evidence | No evidence provided that the Tender meets the requirement. No confidence that the Tenderer can meet the requirement.  |
| 1 | Poor Response | Very limited evidence provided to support that the Tender meets the requirement, with major concerns leading to the conclusion of a low level of confidence that the Tenderer can meet the requirement.  |
| 2 | Minimal Response | Limited evidence to support that the Tender meets the requirement, with major concerns leading to the conclusion of a low level of confidence that the Tenderer can meet the requirement.  |
| 3 | Acceptable Response | Acceptable evidence provided to support that the Tenders meets most of the requirement with minor concerns leading to the conclusion of a medium level of confidence that the Tenderer can meet the requirement.  |
| 4 | Good Response | Good evidence provided to support that the Tender meets the entire requirement leading to the conclusion of a high level of confidence that the Tenderer can meet the requirement.  |
| 5 | Excellent Response | Comprehensive evidence provided to support that the Tender fully meets and/or exceeds the requirement, leading to the conclusion of a high level of confidence that the Tenderer can meet the requirement.  |

* 1. Tenderers shall not cross-refer to answers given elsewhere in a Tender. Tenderers shall answer each question so that it acts as a stand-alone answer. Tenderers may need to repeat certain information in answer to different questions if required.
	2. For the pricing element, the total overall price (30%) shall be calculated based on the lowest priced compliant tender gaining the full 30% award with the remaining marks allocated based on:

|  |  |  |
| --- | --- | --- |
| Score = | Lowest Tender Price | x30% |
| Tender Price |
|  |  |  |
| For example if three Tenders are received and Tenderer A has quoted £3000 as their total overall price, Tenderer B has quoted £5000 and Tenderer C has quoted £8000 then the calculation will be as follows: * Tenderer A score = £3000/£3000 x 30% (maximum marks available) = 30
* Tenderer B score = £3000/£5000 x 30% (maximum marks available) = 18
* Tenderer C score = £3000/£8000 x 30% (maximum marks available) = 11.25
 |

## Part B: Tender Evaluation Matrix

* 1. Evaluation of Tenders shall compromise of the following:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item** |  | **Evaluation Criteria** | **Question Scoring / Weighting** | **Comments** |
| Commercial Criteria |
| 1 | Form of Tender (Schedule 04) | Tenderers shall print, sign, scan and upload to ProContract along with their tender submission. | Pass/ Fail | Please upload response with the file name “[Insert Company Name]-Form of Tender”. |
| 2 | Selection Questionnaire (Schedule 05) | Tenderers shall complete and upload to ProContract along with their tender submission. | Pass/Fail | Please upload response with the file name “[Insert Company Name]-Selection Questionnaire”. |
| Technical Criteria |
|  | A01: Demonstration of relevant experience | Tenderers should include evidence of the following in their response:* Prior relevant experience with B2B communications in financial services and FinTech;
* Names and credentials of members of the project team, along with an account management structure, showing adequate resources available with clear roles and responsibilities outlined.
* Details of similar projects/contracts undertaken in the past;
* A showcase of examples of relevant content previously created.
 | 10 | Please upload response with the file name “[Insert Company Name]-A01”.Responses must be limited to 5 A4 sides. The pages that are over the above limit will not be evaluated.  |
|  | A02: Supplier audience reach and insight | Tenderers should include evidence of the following in their response:* An existing network of relevant local contacts and leads in media and social media, and trade association communities, or an ability to create these quickly;
* Insight into the audience and their behaviours in the Specification (Schedule 07);
* In-depth understanding of various channels, including traditional media and social media.
 | 10 | Please upload response with the file name “[Insert Company Name]-A02”.Responses must be limited to 5 A4 sides. The pages that are over the above limit will not be evaluated.  |
| 3 | A03: Objectives and Strategy | Tenderers should include evidence of the following in their response:* An understanding of the objectives and outcomes of the project;
* An explanation of strategic approach, showing how they will deliver creative, innovative and interactive content and activity to meet the objectives.
 |  25 | Please upload response with the file name “[Insert Company Name]-A03”.Responses must be limited to 5 A4 sides. The pages that are over the above limit will not be evaluated.  |
| 6 | A04: Implementation and Evaluation | Tenderers should include evidence of the following in their response:* A project plan with evidence of ability to deliver within budget, in a timely manner on the objectives of a complex campaign;
* If relevant, detail of proposals for collaborative work with partners (this could be other agencies, companies or organisations) to deliver the project;
* The approach to monitoring and evaluation, whilst campaign is live and post-campaign.
 | 25 | Please upload response with the file name “[Insert Company Name]-A04”.Responses must be limited to 5 A4 sides. The pages that are over the above limit will not be evaluated. |
| Price  |
| 9 | B01: Price | The Tenderer must complete the attached Pricing Schedule document, submitting a fixed price for each deliverable package in Schedule 8 and a total fixed price for all deliverables. | 30 | Please upload response with the file name “[Insert Company Name]-Pricing Schedule”.  |

# SCHEDULE 01 – TENDERERS SUB-CONTRACTING INFORMATION FORM

|  |  |
| --- | --- |
| **Contract Ref No** |  |
|  | [insert name of Sub-contractor] | [insert name of Sub-contractor] | [insert name of Sub-contractor] | [insert name of Sub-contractor] |
| **Is the sub-contractor a Small Medium Sized Enterprise (SME)** |  |  |  |  |
| **Percentage of work being delivered by sub-contractor** |  |  |  |  |
| **The key contract deliverables each sub-contractor will be responsible for** |  |  |  |  |
| **Any other information** |  |  |  |  |

# SCHEDULE 02 – TENDERERS CONSORTIUM INFORMATION FORM

|  |  |
| --- | --- |
| **Contract Ref No** |  |
| **Lead member of consortium who will be contractually responsible for delivery of the contract** |  |
| **Consortium Members** |  |
| **Are any of the consortium members a Small Medium Sized Enterprise (SME)** |  |
| **If the consortium is proposing to form a legal entity, full details of the proposed arrangement must be provided to the Authority.[[4]](#footnote-4)** |  |
| **If the consortium is not proposing to form a legal entity, full details of the proposed arrangement must be provided to the Authority[[5]](#footnote-5)** |  |
| **Any other information** |  |

# SCHEDULE 03 – TENDERERS COMMERCIALLY SENSITIVE INFORMATION FORM

|  |  |
| --- | --- |
| **Contract Ref No** |  |
| **Description of Supplier’s Commercially Sensitive Information[[6]](#footnote-6)** |  |
| **Cross reference(s) to location of sensitive information** |  |
| **Explanation of sensitivity** |  |
| **Details of potential harm from disclosure** |  |
| **Period of confidence** |  |
| **Contact details for Transparency/FOI matters** | Name:Position:Address:Telephone Number:Email Address: |

# SCHEDULE 04 – FORM OF TENDER

|  |
| --- |
| To be returned by 12pm BST on 14/08/2019 |
|  |  |  |
| [insert company name] | [insert address] |
| [insert point of contact] |
| [insert email address] |
| [insert telephone number] |
|  |  |  |
| ITT: **DN432928– Provision Of PR And Digital Services To The Financial Services Campaign, China** |
| **Interpretations**1. Except where specified or the context required, capitalised expressions in this Form of Tender shall have the meaning given to them in the definitions of this ITT.

**Declarations**1. We have examined the ITT and accompanying schedules set out in this ITT and hereby offer to provide the Services specified in this ITT and in accordance with the attached documents to the Authority commencing 30/09/2019 for the period specified in this ITT.
2. If this Tender is accepted, we will execute the Contract and any other documents required by the Authority following the end of the standstill period, if applicable.
3. We agree that:
4. before executing the Contract in the form set out in this ITT, the formal acceptance of this tender in writing by this Authority or such parts as may be specified, together with the documents attached shall comprise a binding contract between the Authority and us;
5. pursuant to EU Directive 1999/93/EC (Community Framework for Electronic Signatures) and the Electronic Communications Act 2009, the Contract may be executed electronically using the Authority’s electronic tendering and contract management system;
6. we are legally bound to comply with the confidentiality provisions set out in this ITT;
7. any other terms or conditions or any general reservation which may be provided in any correspondence sent by the Authority in connection with this Procurement shall not form part of this Tender without the prior written consent of the Authority;
8. the Tender shall remain valid for 120 days from the closing date for Tenders specified in this ITT; and
9. the Authority may disclose our information and documents (submitted to the Authority during the Procurement) more widely within Government for the purpose of ensuring effective cross-Government Procurement processes, including value for money and related purposes.
10. We confirm that:
11. there are no circumstances affecting our organisation which could give rise to an actual or potential conflict of interest that would affect the integrity of the Authority’s decision making in relation to the award of the Contract; or
12. if there are, or may be such circumstances giving rise to an actual or potential conflict of interest we have disclosed this in full to the Authority.

We undertake and it shall be a condition of the Contract that:1. the amount of our tender has not been calculated by agreement or arrangement with any person other than the Authority and that the amount of our tender has not been communicated to any person until after the closing date for the submission of tenders and in any event not without the consent of the Authority;
2. we have not canvassed and will not, before the evaluation process, canvass or solicit any member or officer, employee or agent of the Authority or other contracting authority in connection with the award of the Contract and that no person employed by us has done or will do any such act; and
3. made arrangements with any other party about whether or not they may submit a tender except for the purposes of forming a joint venture.

I warrant that I am authorised to sign this tender and confirm that we have complied with all the requirements of this ITT. |
| **Signed** |  |
| **Print Name** |  |
| **Dated** |  |
| **In the Capacity of** |  |
| **Authorised to sign Tender for and on behalf of** |  |

# SCHEDULE 05 – SELECTION QUESTIONNAIRE

|  |  |
| --- | --- |
| **Section 1** | **Potential supplier information** |
| **Question number** | **Question** | **Response** |
| 1.1(a) | Full name of the potential supplier submitting the information |  |
| 1.1(b) – (i) | Registered office address (if applicable) |  |
| 1.1(b) – (ii) | Registered website address (if applicable) |  |
| 1.1(c) | Trading status 1. public limited company
2. limited company
3. limited liability partnership
4. other partnership
5. sole trader
6. third sector
7. other (please specify your trading status)
 |  |
| 1.1(d) | Date of registration in country of origin |  |
| 1.1(e) | Company registration number (if applicable) |  |
| 1.1(f) | Charity registration number (if applicable) |  |
| 1.1(g) | Head office DUNS number (if applicable) |  |
| 1.1(h) | Registered VAT number  |  |
| 1.1(i) - (i) | If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established? | Yes ☐No ☐N/A ☐ |
| 1.1(i) - (ii) | If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s). |  |
| 1.1(j) - (i) | Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement? | Yes ☐No ☐ |
| 1.1(j) - (ii) | If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this. |  |
| 1.1(k) | Trading name(s) that will be used if successful in this procurement |  |
| 1.1(l) | Relevant classifications (state whether you fall within one of these, and if so which one)1. Voluntary Community Social Enterprise (VCSE)
2. Sheltered Workshop
3. Public service mutual
 |  |
| 1.1(m) | Are you a Small, Medium or Micro Enterprise (SME)[[7]](#footnote-7)? | Yes ☐No ☐ |
| 1.1(n) | Details of Persons of Significant Control (PSC), where appropriate: [[8]](#footnote-8) - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met;  - Over 25% up to (and including) 50%,  - More than 50% and less than 75%,  - 75% or more. [[9]](#footnote-9)(Please enter N/A if not applicable) |  |
| 1.1(o) | Details of immediate parent company: - Full name of the immediate parent company- Registered office address (if applicable)- Registration number (if applicable)- Head office DUNS number (if applicable)- Head office VAT number (if applicable)(Please enter N/A if not applicable) |  |
| 1.1(p) | Details of ultimate parent company:- Full name of the ultimate parent company- Registered office address (if applicable)- Registration number (if applicable)- Head office DUNS number (if applicable)- Head office VAT number (if applicable)(Please enter N/A if not applicable) |  |
| **Section 1** | **Bidding Model** |
| **Question number** | **Question** | **Response** |
| 1.2(a) - (i) | Are you bidding as the lead contact for a group of economic operators? | Yes ☐No ☐ If yes, please provide details listed in questions 1.2(a) (ii), (a) (iii) and to 1.2(b) (i), (b) (ii), 1.3, Section 2 and 3.If no, and you are a supporting bidder please provide the name of your group at 1.2(a) (ii) for reference purposes, and complete 1.3, Section 2 and 3. |
| 1.2(a) - (ii) | Name of group of economic operators (if applicable) |  |
| 1.2(a) - (iii) | Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure. |  |
| 1.2(b) - (i) | Are you or, if applicable, the group of economic operators proposing to use sub-contractors? | Yes ☐No ☐ |
| 1.2(b) - (ii) | If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name |  |  |  |  |  |
| Registered address |  |  |  |  |  |
| Trading status |  |  |  |  |  |
| Company registration number |  |  |  |  |  |
| Head Office DUNS number (if applicable) |  |  |  |  |  |
| Registered VAT number |  |  |  |  |  |
| Type of organisation |  |  |  |  |  |
| SME (Yes/No) |  |  |  |  |  |
| The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables |  |  |  |  |  |
| The approximate % of contractual obligations assigned to each sub-contractor |  |  |  |  |  |

 |
| Section 1 | Contract Details and Declaration |
| 1.3 | I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate. I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document. I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement. I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.I am aware of the consequences of serious misrepresentation. |
| **Section 2** | **Grounds for mandatory exclusion[[10]](#footnote-10)** |
| **Question Number** | **Question** | **Response** |
| 2.1(a) | **Regulations 57(1) and (2)** The detailed grounds for mandatory exclusion of an organisation are set out on this [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions. Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf). |
|  | Participation in a criminal organisation.  | Yes ☐No ☐If Yes please provide details at 2.1(b) |
|  | Corruption.  | Yes ☐No ☐If Yes please provide details at 2.1(b) |
|  | Fraud.  | Yes ☐No ☐If Yes please provide details at 2.1(b) |
|  | Terrorist offences or offences linked to terrorist activities | Yes ☐No ☐If Yes please provide details at 2.1(b) |
|  | Money laundering or terrorist financing | Yes ☐No ☐If Yes please provide details at 2.1(b) |
|  | Child labour and other forms of trafficking in human beings | Yes ☐No ☐If Yes please provide details at 2.1(b)  |
| 2.1(b) | If you have answered yes to question 2.1(a), please provide further details.Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,Identity of who has been convictedIf the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents. |  |
| 2.2 | If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion ? (Self Cleaning) | Yes ☐No ☐ |
| 2.3(a) | **Regulation 57(3)**Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions? | Yes ☐No ☐ |
| 2.3(b) | If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines. |  |
| **Section 3** | **Grounds for discretionary exclusion** |
| **Question Number** | **Question** | **Response** |
| 3.1 | **Regulation 57 (8)**The detailed grounds for discretionary exclusion of an organisation are set out on this [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions. Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation. |
| 3.1(a) | Breach of environmental obligations?  | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1 (b) | Breach of social obligations?  | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1 (c) | Breach of labour law obligations?  | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(d) | Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation’s assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(e) | Guilty of grave professional misconduct? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(f) | Entered into agreements with other economic operators aimed at distorting competition? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(g) | Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(h) | Been involved in the preparation of the procurement procedure? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(i) | Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions? | Yes ☐No ☐If yes please provide details at 3.2 |
| 3.1(j)3.1(j) - (i)3.1(j) - (ii)3.1(j) –(iii)3.1(j)-(iv) | Please answer the following statementsThe organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.The organisation has withheld such information. The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award. | Yes ☐No ☐If Yes please provide details at 3.2Yes ☐No ☐If Yes please provide details at 3.2Yes ☐No ☐If Yes please provide details at 3.2Yes ☐No ☐If Yes please provide details at 3.2 |
| 3.2 | If you have answered Yes to any of the above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self-Cleaning) |  |
| Section 4 | Economic and Financial Standing |
| Question Number | Question | Response |
| 4.1 | Are you able to provide a copy of your audited accounts for the last two years, if requested?If no, can you provide **one** of the following: answer with Y/N in the relevant box. | Yes ☐No ☐ |
| (a) A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. | Yes ☐No ☐ |
| (b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. | Yes ☐No ☐ |
| **4.2** | Where we have specified a minimum level of economic and financial standing and/ or a minimum financial threshold within the evaluation criteria for this procurement, please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out. | Yes ☐No ☐ |
| **Section 5** | **If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:** |
| Name of Organisation |  |
| Relationship to the Supplier completing the questions |  |
| **Question Number** | **Question** | **Response** |
| **5.1** | Are you able to provide parent company accounts if requested to at a later stage? | Yes ☐No ☐ |
| **5.2** | If yes, would the parent company be willing to provide a guarantee if necessary? | Yes ☐No ☐ |
| **5.3** | If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?  | Yes ☐No ☐ |
| **Section 6** | **Modern Slavery Act 2015: Requirements under the Modern Slavery Act 2015** |
| **Question Number** | **Question** | **Response** |
| 6.1 | Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")? | Yes ☐N/A ☐ |
| 6.2 | If you have answered yes to question 7.1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015? | Yes ☐Please provide the relevant url …No ☐Please provide an explanation |
| **Section 7** | **Cyber Essentials** |
| **Question Number** | **Question** | **Response** |
| 7.1 | Please confirm that you will be able to demonstrate that you meet the technical requirements prescribed by Cyber Essentials Scheme as identified at Section 4 Part H to this ITT by the commencement date. | Yes ☐No ☐Please provide an explanation |
| **Section 8** | **Insurance** |
| **Question Number** | **Question** | **Response** |
| 8.1 | Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated within.Employer’s (Compulsory) Liability Insurance = Five Million Pounds Sterling (£5,000,000)Public Liability Insurance = Five Million Pounds Sterling (£5,000,000)Professional Indemnity Insurance = Two Million Pounds Sterling (£2,000,000) \*It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders. | Yes ☐No ☐Please provide an explanation |
| **Section 9** | **Compliance** |  |
| **Question Number** | **Question** | **Response** |
| 9.1 | Please attach Form of Tender (Schedule 5) |
| 9.2 | Please confirm acceptance of the Contract Terms and Conditions |  |

# SCHEDULE 06 – CONTRACT CONDITIONS

# SCHEDULE 07 - SPECIFICATION OF REQUIREMENTS

**Summary of Requirement**

The Department for International Trade in China is looking to appoint one organisation for the provision of PR and Digital Services **to our team based at the British Embassy in Beijing**. The main duties of the Agency would be to create, consult and deliver on a PR and Digital strategy for the Financial Services Campaign, which is running in China from September 2019 to March 2020. The campaign will also have an advertising element supported by an existing media-buy agency.

The duties of the Agency will commence following the signing of the contract (ideally in late September 2019) and end on 31 March 2020. At this point any active projects and documents relevant to the project must be handed over to The Authority to support any further work.

**Background and Context**

**Background**

With the expectation of leaving the EU on 31 October, DIT aims to use this opportunity to launch a campaign which promotes the continued strengths and opportunities for Chinese firms with the UK financial services industry, with a particular focus on the strengths of UK capital markets and financial technology (FinTech).

**Key Messages**

Capital Markets

* + The UK is the world’s premier financial services centre and an unrivalled launch pad for Chinese companies going global
	+ The UK has the deepest capital markets, the largest FX market and largest RMB market in the West
	+ With globally respected regulators and the world’s most innovative financial firms, the UK is a natural partner as China tackles financial risk and develops its markets

FinTech

* + UK FinTech firms are world beaters in financial inclusion, regulatory technology, electronic payments, market infrastructure, open banking in which all meet the needs of China’s financial sector
	+ UK remains open to Chinese investment into UK FinTech
	+ UK’s innovative Sandbox and OpenBanking approach to FinTech regulation has created a dynamic and safe UK environment and can be deployed in China

**Strengths of the UK Offer**

Capital Markets

The UK has a lot to offer in terms of financial services (UKFS). 2.2 million people work in the UK across UKFPS, with two-thirds outside of London. UKFS contributed £11 to every £100 of UK economic output in 2017 and generates a net trade surplus greater than all other net exporting industries combined (£11bn in 2015). London is also the largest foreign exchange trading centre in the world and the second largest asset management centre after the USA. The London Stock Exchange has more international companies than any other exchange in the world.

When it comes to China, the significance of this sector cannot be overstated. As Chinese economic growth slows, the Chinese government continues to increase focus on Chinese companies “going global”, through initiatives like the Belt and Road Initiative (BRI). This means that Chinese companies are increasingly in need of international financial services as well as access to new sources of financing/financial products. In addition, with the US generally unwilling to work with Chinese firms, these same firms are looking to the UK for consultation and opportunities. The UK’s openness to trade and investment from foreign firms, including China, as well as the fact that the UK has the largest RMB trading centre outside Hong Kong, creates an opportunity for the UK to secure more business in this area.

FinTech

The UK sits at the heart of the global financial community, offering world-class financial goods and services, talent and expertise. We’re home to top FinTech companies, pushing financial services boundaries and attracting major global investment. The UK is a leading financial service centre, with the highest concentration of global financial institutions in the world.

With regards to UK FinTech specifically, this sector is highly tipped to be the future and a force for good. At the recent UK FinTech Week thousands of entrepreneurs, investors, regulators and others gathered to network and showcase the impressive innovation happening in the UK.

The UK FinTech sector is attracting nations from across the globe. At FinTech Week there were more than 15 trade delegations from the likes of China, the Middle East, North America and Europe. Despite ‘Brexit’ the sector is thriving. Private equity and venture capital is pouring in and is the largest behind the USA and China.

The figures speak for themselves. $3.3 billion in 18/19 and already over $1 billion in the first quarter of this FY. More than 76,000 people and 25% of the world’s FinTech ‘unicorns’ are located in the UK adding over £7 billion to the UK economy annually.

The industry is also a key sector for the Department. In April, the previous Secretary of State for International Trade, launched two FinTech Bridge Pilot Programmes in Australia and Hong Kong. The Programs aim to bolster existing frameworks, providing tailored, structured support for each company within the cohort. In doing so, the aim is to open further opportunities for UK financial technology companies and to reduce barriers faced as they undertake their international expansion.

The FinTech market in China is developing at a rapid speed and is a highly dynamic and increasingly efficient industry with China now being home to some of the largest FinTech companies in the world. Beijing, Shanghai, Shenzhen and Hangzhou in particular have emerged as leading FinTech hubs in China, with strong support from the local municipal governments there.

China has the highest FinTech adoption rate across 20 major economies including the UK, US and Australia with 69% of Chinese consumers using at least two FinTech services in the last six months. With 83% of these individuals using services to make payments or transfer money, 58% for savings and investments and 46% to borrow money. The FinTech industry in particular plays a big role in helping to serve the demands of groups who have been unable to access traditional banking services, such as SMEs and low-income earners.

Export Opportunities in FinTech

The Chinese market presents a plethora of opportunities for UK FinTech firms with a 44% annual growth rate and high demand for innovative financial technology. There is demand from across the sector, however DIT has observed particularly strong demand for services and partnerships in the following areas:

* **FINANCIAL INCLUSION:** China has placed huge importance on social prosperity, with improving financial inclusion being included in the national strategic plan. However, at present there remains a large gap between the demands of SMEs and individuals for access to funding and what services are available in the market. FinTech is helping to bridge this gap and as such lending platforms, credit scoring and credit analysis have become an area of focus.
* **REGULATORY TECHNOLOGY:** the rapid development of the industry locally and increasing systemic importance of FinTech in China has led to greater regulatory oversight of the industry to rein in risks and strengthen consumer protection. The increased scrutiny from regulators combined with tighter regulation of the space has led to a significant uptick in the demand for Regulatory Technology (‘RegTech’).

Demand for RegTech is both from businesses and regulators, predominantly in the following areas regulatory reporting, fraud prevention, identity verification, regulatory compliance, cybersecurity, anti-money laundering, risk analysis and management & transaction monitoring amongst others.

* **ELECTRONIC PAYMENTS:** A mature sector, but it is expected that the industry will continue to grow at annual rate of more than 50% over the coming years, with this being driven by rapid growth in **cross border e-commerce, inbound and outbound tourism and by Chinese students going abroad**.
* **MARKET INFRASTRUCTURE:** As China’s capital markets continue to grow at a rapid pace, with China now the third largest bond market in the world and home to two of the world’s largest stock markets, demand has developed for financial infrastructure to improve market efficiency. The advent of new programmes connecting China’s capital markets with the rest of the world has also seen demand for more advanced infrastructure. In particular areas of interest include: trading/wealth management platforms, blockchain, big data analysis, quantum computing etc. and other infrastructure around cross-border FX trading.
* **OPEN BANKING:** 2018 was one of the first years where Chinese firms and regulators began exploring open banking and also saw numerous data sharing partnerships but also increasing regulation around third party partnerships and how data is stored and used.

DIT believes there are opportunities for FinTech companies specifically within the areas of payments, investment, and lending amongst others to engage with Chinese banks to help them build up their FinTech platforms.

**Timing**

Brexit is having an impact on confidence with Chinese firms, slowing down or pausing trade and investment activity until there is greater clarity on the outcome. In the meantime, financial centres in Europe are increasing their marketing and engagement to seize greater financial services opportunities. Frankfurt and Luxembourg are leading the pack with a particular focus on capital markets and asset management opportunities.

Therefore, an integrated campaign to deliver strong commercial and political messages to promote world-class UK financial services and inspire Chinese companies to think UK as a launch pad for expanding their business is essential. This is combined with strategic engagement with the Chinese government and business to create long-term opportunities, as per the Regional Trade Plan for China and Hong Kong.

A major milestone this year that can be seen as a sign for greater partnership and a welcoming outlook between China and the UK is the launch of the London-Shanghai Stock Connect. It took place during the Economic and Financial Dialogue in London on 17 June. This is the first connect of its kind outside of China/Hong Kong.

**The Department for International Trade and the Global Trade Campaign**

The role of the Department for International Trade (DIT) is to secure UK and global prosperity by promoting international trade and investment, and championing free trade. All of DIT’s work in this area drives towards objectives which are as follows:

* A significant increase in the UK market share of China's goods imports.
* A doubling of the value of UK services exports.
* Broader, deeper UK-China investment partnership, with the UK as top European destination for Chinese investment.

This year DIT is running a Global Trade Campaign (GTC), which aims to ensure that innovative, creative and impactful activity is created and delivered to increase the UK’s share of voice on trade, and positions the UK as a global trading nation. The primary objectives of the GTC are:

1. Lead Generation - Online trade queries which contribute to Her Majesty’s Trade Commissioner’s export targets measured through DataHub, an internal CRM system.
2. Behaviour Change - DIT wants people to move to actively consider trading with the UK and contribution to the UK’s market access. This will be measured by the GREAT perception study.
3. Increased UK Recognition - Via DIT’s promotional campaign amongst international B2B and G2B buying audiences from 19% to 24% by 2020 (as measured through 2016 GREAT perception Ipsos MORI study).
4. Change Attitudes - Which is specific change in the technology market and, again, measured by the GREAT perception study.

GTC funded activity should lead to directly measurable trade outcomes and should deliver to the UK economy increased levels of trade and increased intent to trade with the UK. This campaign aims to generate business enquiries, change behaviours and attitudes, and raise awareness.

**The Financial Services Campaign**

In China and Hong Kong, DIT are planning to focus this campaign on capital markets and FinTech and create a financial services campaign. The goals of the financial services campaign are closely aligned with that of the GTC, noted above namely: to generate jobs and growth for Britain, by inspiring the world to think and feel differently about the UK and demonstrating that the UK is an innovative nation with world-class companies who can successfully partner and deliver value.

Specifically, DIT objectives are as follows:

* Raise awareness of the opportunities to buy from or partner with UK companies to a Chinese business audience.
	+ Capital market: promote the strength of UK capital markets as a place to raise capital and the range of the UK’s financial services available for Chinese firms “going global” and funding infrastructure in a third country (for example those projects under BRI), from FX trading, listing bonds, IPOs, fund management, wealth management, trade finance, project finance, dispute resolution.
	+ FinTech: promote the UK as the world leading FinTech hub in the Chinese market.
* Drive enquiries from Chinese business interested in buying from the UK or partnering with UK companies, i.e.
	+ Capital markets: boost the pipeline of Chinese firms utilising UK capital markets to raise finance (currently there are approximately 3-4 issuance a year with no major IPOs from Chinese firms on the London Stock Exchange.)
	+ FinTech: support prioritised UK FinTech companies to explore business opportunities and achieve expansion in the Chinese market through matching supply with demand.

**Requirements**

**PR and digital strategic consultancy**

* Provide a strategy and integrated PR and digital plan that brings the campaign to life and meets DIT’s objectives, taking into consideration how it integrates with an ad campaign to be run by an existing media-buy partner;
* Provide a content and channel strategy including owned, earned and bought channels which identifies target audience, suggested content for each channel.

**Media and KOL relations**

* Identifying, profiling, building relationships with key mainstream, trade and sector-specific media in China, as well as Key Opinion Leaders (KOLs)/Accounts on relevant social media channels; this would not involve paid content placement;
* Identifying, profiling and facilitating partnerships with trade associations in China.
* Advising and facilitating media partnership.

**Media bureau**

* Creating Frequently Asked Questions (FAQs), briefings for use by media;
* Creating briefings for DIT spokesperson before media/digital activity;
* Article/message placement in relevant publications/media, business influencers’ communications and/or other PR activity if appropriate;
* Organising press briefings, conferences and setting up remote and in-person interviews for speakers/thought-leaders (including the briefing of speakers and officials);
* Press office support for key media activities and events under the Campaign
* Media monitoring and analysis.

**Digital media**

* Generating and delivering a content plan for owned social media channels and a potential Electronic Direct Mail (eDM) channel ensuring a regular drumbeat of engaging and interactive content;
* Creating and delivering an amplification plan through KOLs/accounts targeted to the campaign audience in China’s mainland;
* Audience engagement and follow up with audience comments and enquiries;
* Monitoring and analysis of the reach of generated content on social media, benchmarking against other/previous campaigns and/or competitor nations in Innovation promotion.

**Content Creation**

* Conducting research and analysis of hot topics, proactive story angles, industry research, relevant news, while collecting stats, case studies and insights from online sources and from DIT and industry associations and partners;
* Message House and Facts and Stats development for the campaign both from online sources and with input from DIT and industry associations and partners
* PR content, including but not limited to press releases, media feature articles, media activity briefing books, media clippings, blogs and op-eds, etc.;
* Digital content, including but not limited to: WeChat, LinkedIn, eDM, Weibo, H5, videos, infographics, etc.

**Project planning & Implementation**

* Provide a clear plan and timeline for each project;
* Provide clear team structure and responsibilities to ensure efficiency of work, and one main contact point;
* Plan development and content sign-off process establishment;
* Provide clear KPIs, a specific periodical review scheme to look into the effectiveness of project implementation and provide resolutions to problems;
* Updated pitch/interview status report;
* A clear plan on how success will be monitored, scored and reported.

# SCHEDULE 08 – Deliverables

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| --- | --- | --- |
| **No.** | **Deliverable** | **Indicative dates for delivery (subject to change)** |
| 1 | PR and digital strategic consultancy* Develop an integrated PR and digital strategy for the duration of the campaign;
* Draft content and channel strategy within the first 2 weeks of contract;
 | 14/10/2019 |
| 2 | Content creation * A series of compelling, well-researched, concise content (2-4 new content piece/month, including those around key events). Aim for high quality control before sending to client to reduce number of iterations;
* Content to be drafted in English and translated into simplified Chinese, if required.
 | Ongoing, throughout key events in Oct 2019 – Mar 2020. |
| 3 | Media and KOL relations * Develop and update target media network (new media included) list in Mainland China and Hong Kong;
* Provide list of key opinion leaders/accounts in Mainland China and Hong Kong, directly liaise with them and facilitate interview, photo opportunities and co-promotion both online and/or offline.
 | Ongoing, the database should be maintained and updated on a regularly basis.Initial draft to be submitted by 18 Oct. |
| 4 | Media bureau* Draft key messaging document within first month of contract, and update the document as the campaign progresses;
* At least one press piece around 4-6 key events;
* Target of 150 press clippings over the contract period;
* 30% of coverage in top tier target media (these outlets will be specified following contract award);
* 20% long form coverage (op-eds, features, blogs);
* 90% positive sentiment/landing key DIT messages;
* Facilitate partnership with 3-5 top tier/trade media.
 | Initial draft of key messaging document by 18 Oct, finalised by 30 Oct.Pieces to be created throughout key events in Oct 2019 – Mar 2020.  |
| 5 | Media interviews & op-eds* Aim for no less than 20 pieces feature stories, case studies and/or op-eds published by media titles during the contract period;
* Arrange at least 7 media interviews with key personalities during the contract period.
 | Take place throughout key events in Oct 2019 – Mar 2020. |
| 6 | Media pitching and invitation* Select relevant and influential media to pitch stories, case studies and/or op-eds;
* Invite and coordinate relevant and influential media for media activities.
 | Take place throughout key events in Oct 2019 – Mar 2020. |
| 7 | Media monitoring and analysis* Daily summary of media coverage and social media mentions;
* Timely follow-up on coverage after media activities;
* Monthly summary of trending topics, key research findings, industry reports etc.
 | Take place throughout key events in Oct 2019 – Mar 2020. |
| 8 | Digital media* Create 8 pieces of original/organic content for DIT WeChat throughout the campaign period, and repurpose the content for amplification on other relevant owned channels;
* Repurposing press releases and WeChat pieces onto other digital channels, including HMTC LinkedIn, LinkedIn InMail, Weibo, and eDM as deemed necessary;
* Create and host a digital brochure/catalogue in H5 and PDF format that are downloadable;
* Engage with 3-4 influencers for content co-creation across the different sectors in Hong Kong and Mainland China throughout the campaign period.
 | Take place throughout key events in Oct 2019 – Mar 2020. |

# SCHEDULE 09 – Indicative Key Performance INdicators

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Metric | KPI | What information is required to measure this KPI? | How will the KPI be measured? | Red | Amber  | Green |
| Contract management | **KPI 1** Event-based and monthly Reports and Invoices | Brief event based, and monthly reports to be produced within five (5) working days of the end of each month.Invoices to be issued within three (3) working days of completion of deliverables. | Report structure, format and template to be agreed upon between DIT and supplier.Invoices will quote the correct PO, contract number, DIT assigned Job Reference, the Authority Contact, and qualitative description of the work being done.Invoices must be clearly itemised. | Below 100% received on time and accurate | N/A | 100% received on time and accurate  |
| Delivery | **KPI 2**Deliverables to be submitted on time and in full by agreed deadlines | Receipt of deliverables by 3pm Beijing Standard Time on the date of the deadline. | Deadlines for each deliverable to be agreed in advance.Failure to meet deadline needs to be communicated and agreed in advance. | Below 100% received on time and accurate | N/A | 100% received on time and accurate |
| Quality | **KPI 3**Deliverables to meet agreed objectives and KPIs. | Delivery of a quality service to DIT and to deliver a high-quality world-class PR and digital campaign. | All work will be undertaken in accordance with the agreed objectives and KPIs. | Deliverables do not meet all agreed objectives and KPIs. | N/A | Deliverables meet all agreed objectives and KPIs. |

1. Unless the context otherwise requires, the following words and expressions used within this ITT (except Appendix B: Authority’s Conditions of Contract) shall have the following meanings (to be interpreted in the singular or plural as the context requires). [↑](#footnote-ref-1)
2. Any reference to a statute or statutory provision is a reference to such statute or statutory provision as amended to re-enacted. A reference to a statute or statutory provision includes any subordinate legislation made under that statute or statutory provision, as amended or re-enacted. [↑](#footnote-ref-2)
3. These may be subject to change by the Authority. Tenderers shall be informed via the Authority’s e-Tendering Platform (ProContract) in the event it is necessary to make amendments to the Timetable. [↑](#footnote-ref-3)
4. If the Tenderer proposes to create a separate legal entity such as a Special Purpose Vehicle (SPV), the Tenderer should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity titled “Special Purpose Vehicle Entity". [↑](#footnote-ref-4)
5. Include full details of its alternative arrangements including details of any sub-contractors (which could be by including a copy of the completed sub-contractors form). [↑](#footnote-ref-5)
6. You are advised to provide as much information as possible. The Authority shall endeavour to maintain the confidentiality of the sensitive information, but the ultimate decision on whether to publish or disclose lies with the Authority. [↑](#footnote-ref-6)
7. See EU definition of SME <https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en> [↑](#footnote-ref-7)
8. UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. [See PSC guidance](https://www.gov.uk/government/publications/guidance-to-the-people-with-significant-control-requirements-for-companies-and-limited-liability-partnerships). [↑](#footnote-ref-8)
9. Central Government contracting authorities should use this information to have the PSC information for the preferred supplier checked before award. [↑](#footnote-ref-9)
10. The authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions. [↑](#footnote-ref-10)