



Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Space Agency

Subject: UKSA Microgravity Business Consultant

Sourcing Reference Number: CS20399

UK Shared Business Services Ltd (UK SBS)
www.uksbs.co.uk

Registered in England and Wales as a limited company. Company Number 6330639.
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Version 4.0

UKSBS
Shared Business Services

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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for the Contracting Authorities of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our Contracting Authorities. This allows Contracting Authorities the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by the Department for Business, Energy & Industrial Strategy (BEIS), UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

Privacy Statement

At UK Shared Business Services (UK SBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UK SBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.
- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

Privacy Notice

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the General Data Protection Regulation (GDPR).

YOUR DATA

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;
Names and contact details of employees proposed to be involved in delivery of the contract;
Names, contact details, age, qualifications and experience of employees whose CVs are submitted as part of the bid.

Purpose

The Contracting Authority are processing your personal data for the purposes of the tender exercise, or in the event of legal challenge to such tender exercise.

Legal basis of processing

The legal basis for processing your personal data is processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller, such as the exercise of a function of the Crown, a Minister of the Crown, or a government department; the exercise of a function conferred on a person by an enactment; the exercise of a function of either House of Parliament; or the administration of justice.

Recipients

Your personal data will be shared by us with other Government Departments or public authorities where necessary as part of the tender exercise. The Contracting Authority may share your data if required to do so by law, for example by court order or to prevent fraud or other crime.

Retention

All submissions in connection with this tender exercise will be retained for a period of (7) years from the date of contract expiry, unless the contract is entered into as a deed in which case it will be kept for a period of (12) years from the date of contract expiry.

YOUR RIGHTS

You have the right to request information about how your personal data are processed, and to request a copy of that personal data.

You have the right to request that any inaccuracies in your personal data are rectified without delay.

You have the right to request that any incomplete personal data are completed, including by means of a supplementary statement.

You have the right to request that your personal data are erased if there is no longer a justification for them to be processed.

You have the right in certain circumstances (for example, where accuracy is contested) to request that the processing of your personal data is restricted.

You have the right to object to the processing of your personal data where it is processed for direct marketing purposes.

You have the right to object to the processing of your personal data.

INTERNATIONAL TRANSFERS

Your personal data will not be processed outside the European Union

COMPLAINTS

If you consider that your personal data has been misused or mishandled, you may make a complaint to the Information Commissioner, who is an independent regulator. The Information Commissioner can be contacted at:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF
0303 123 1113
casework@ico.org.uk

Any complaint to the Information Commissioner is without prejudice to your right to seek redress through the courts.

CONTACT DETAILS

The data controller for your personal data is:

The Department for Business, Energy & Industrial Strategy (BEIS)

You can contact the Data Protection Officer at:

BEIS Data Protection Officer, Department for Business, Energy and Industrial Strategy, 1 Victoria Street, London SW1H 0ET. Email: dataprotection@beis.gov.uk.

Section 2 – About the Contracting Authority

UK Space Agency (UKSA)

The Agency is responsible for all strategic decisions on the UK civil space programme and we provide a clear, single voice for UK space ambitions. The UK Space Agency is at the heart of UK efforts to explore and benefit from space. The UK's thriving space sector contributes £9.1 billion a year to the UK economy and directly employs 28.900 with an average growth rate of almost 7.5%.

Collaboration lies at the core of the UK Space Agency ethos and applies across Government as well as to external organisations including European and global partners such as the European Space Agency (ESA), the European Union, national space agencies and the United Nations.

The Agency provides funding for a range of programmes via programmes such as the National Space Technology Programme and FP7 and works closely with national and international academic, education and community partners.

UK Space Agency achievements include:

- Implementing Government £10m National Space Technology Programme to support the development of UK technology and services/applications using space data. The first four flagship programmes totalled £6m, matched by £5m from industry.
- The Climate and Environmental Monitoring from Space facilities at the International Space Innovation Centre, supported by £400,000 funding, will make satellite data available to space businesses and institutions, particularly those which do not have the infrastructure to exploit Earth observation data.
- Chaired and led the International Charter 'Space and Major Disasters', to task Earth observation satellites quickly to provide data following a major disaster

www.BEIS.gov.uk/ukspaceagency

Section 3 - Working with the Contracting Authority.

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	UK Space Agency, Polaris House, North Star Avenue, Swindon, SN2 1SZ
3.2.	Buyer name	Chris Grant
3.3.	Buyer contact details	Professionalservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	The contract value shall not exceed £100,000.00 excluding VAT.
3.5.	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available here. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Wednesday, 11 November 2020
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Monday, 16 November 2020 14.00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Wednesday, 18 November 2020
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Wednesday, 25 November 2020 14.00
3.10.	Date/time Bidders should be available if clarifications are required	Monday, 30 November 2020
3.11.	Anticipated notification date of successful and unsuccessful Bids	Friday, 04 December 2020
3.12.	Anticipated Contract Award date	Wednesday, 09 December 2020
3.13.	Anticipated Contract Start date	Friday, 11 December 2020
3.14.	Anticipated Contract End date	Wednesday, 31 March 2021
3.15.	Bid Validity Period	60 Days

• Section 4 – Specification

Introduction

Over the last year the UK has had an increasing interest in being the European hub for the commercialisation of Microgravity technology. The UK is currently leading the way in developing the community around the commercialisation of microgravity, the inclusion of Microgravity applications in the European Space Agency (ESA) Advanced Research in Telecommunications Systems (ARTES) Business Applications and Space Solutions (BASS) programme and the development of a bid to be the delivery partner for the ESA Business in Space Growth Network. This procurement is for six months of a business development consultant, who's role will be to lead the engagement with companies in sectors that could benefit from the use of microgravity, to continue to develop and bring together the community in a way that will see the coordination of bids into the ARTES BASS programme by March 2021.

Background to the Requirement

Historically, research in the space environment (utilising the conditions of being in space, such as microgravity, vacuum or increased radiation) has been carried out through institutional programmes on the International Space Station (ISS). Today, however, the ISS platform is being opened up to commercial users, and there are new platforms being planned, including those supported by the UK's Launch UK programme, that can provide new facilities.

Microgravity experiments and activities have the capability to drive optimisation, superior performance and efficiency in processes and products in areas as diverse as pharmaceuticals, semiconductors and materials. To date much of the activity in microgravity has been concentrated in universities however a new breed of company are beginning to exploit the opportunity on a commercial basis.

The US, through CASIS (Center for Advancement of Science in Space) and now commercial companies, are leading the charge in this area. Europe is in second place, with Japan also showing interest. **Within Europe, the UK is the leading nation, as evidenced by the responses to the recent ESA RFI call in this area, where the UK provided the majority of all responses (51% were from the UK, the rest from other ESA member states). Crucially, we are ahead of ESA's efforts in this area.**

The work of CASIS and others in exploiting the ISS has set the baseline from which greater European engagement can develop within a global landscape. The CASIS portfolio of projects has leveraged more than \$100M from non-NASA and non-CASIS sources. **The addressable market for this portfolio is estimated to be more than \$110B.**

Globally, ESA, NASA, and other space agencies have an interest in encouraging the commercialisation of the Low Earth Orbit (LEO) research market, and the creation of a LEO manufacturing market. Exploration programmes are looking to sending humans back to the Moon and onto Mars, for the scientific, technological and inspirational benefits that these programmes bring. These programmes will require a research base in LEO, such as the ISS, but space agencies budgets will not allow for supporting both continued operations in LEO, and activities further out in the Solar System. As such they are looking to a model where they are just one of the customers of a LEO research facility (the ISS, or in time, similar commercial stations), rather than the sole provider and funder of such activities.

Aims & Objectives

The successful supplier will:

- Stimulate and grow the UK Commercial Microgravity market by:
 - Talking confidently about microgravity, its history, potential uses, and opportunities
 - Running a minimum of 4 workshops over the six-month period promoting the opportunities Microgravity offers.
 - Engage with a minimum of 20 companies as either suppliers or users of microgravity services over the six-month period
 - Coordinate a minimum of 3 completed Activity Pitch Questionnaires (APQs) with the Community focused on the use of Microgravity in the ARTES BASS programme.
 - And using other ideas that may be developed during the tenure of this post.
- Establish the different areas of opportunity across the UK for Commercial Microgravity by:
 - Having an understanding of the potential markets of:
 - Pharma and Lifesciences
 - Materials production and Manufacturing
 - Novel and unique gifts
 - Working alongside the ESA Business Applications Regional Ambassadors (<https://business.esa.int/ambassador-platforms/ap-uk>) to lead the development of regional stakeholder communities and stakeholder maps of these potential markets
- Look at the market strategically and plan how and what interventions need to take place to increase the market penetration of the technology.
- Normalise the technology in a way that enables non-technical specialists to be able to engage with Microgravity in terms of practical steps that lead to success.
- Be able to understand and communicate the funding opportunities available through ESA and be able to guide potential applicants as to what needs to be done to be “APQ ready”.
- Outreach to potential customers of the technology and engage with them on their terms focusing on what the technology can do for them, their company, and their industry.

Objectives

Coordinate a minimum of 3 completed Activity Pitch Questionnaires (APQs) with the Community focused on the use of Microgravity in the ARTES BASS programme.

Run a minimum of 4 workshops over the six-month period promoting the opportunities Microgravity offers.

Engage with a minimum of 20 companies as either suppliers or users of microgravity services over the six-month period.

Write and have published a minimum of 3 articles focussing on the UK as a European Centre for Microgravity commercialisation.

To work with all the UK Ambassador Platform for the ESA BASS programme to understand how to engage the regions in the microgravity community.

Scope

- The Contracting Authority will provide the successful suppliers team with a UK Space Agency laptop including email address, and mobile phone.
- This agreement will be in place up to but not after 31st March 2021.
- The geographical scope of this agreement is limited to Mainland Great Britain and Northern Ireland only.
- The successful supplier will focus on the commercial Pharma & Lifesciences, Materials production & Manufacturing, and Novel & Unique gifts sectors. Any work in other commercial sectors must be agreed with the Authority before any work commences to investigate them.
 - The UK Space Agency will provide some contacts within the Pharma & Lifesciences sector, but these are limited and will be subject to GDPR.
- Engaging with the Academic, Scientific, and Research and Development communities to explore the opportunities for commercial spin outs using Microgravity is within scope of this agreement. All other non-commercial activities including but not limited to, pure Research and Development is excluded from the scope of this agreement.

Requirement

The requirements below should be conducted following the latest Government rules and guidance on Coronavirus and the successful supplier should use online and virtual meeting tools, or other socially distanced measures where Covid-safe face to face meetings or in person workshops cannot be held.

The successful supplier should be as self-sufficient as possible with the ability to work autonomously and with a high degree of initiative and drive. e.g. organising and setting up workshops, meetings, and connecting with companies.

Coordinate a minimum of three completed Activity Pitch Questionnaires (APQs) with the Community focused on the use of Microgravity in the ARTES BASS programme from across the Pharma and Lifesciences, Materials production and Manufacturing, and Novel & unique gifts sectors.

Engage with a minimum of 20 companies as either suppliers or users of microgravity services over the contract period to explore the potential in the marketplace. Activities should include but not be limited to:

- Identifying potential suppliers and/or customers of microgravity services.
- Connecting companies and organisations together to build use cases for potential Microgravity products/applications/services.
- Cultivating potential projects to develop into proposals that can be submitted to the ESA BASS programme as completed APQs.

Run a minimum of four workshops over the six-month period promoting the opportunities Microgravity offers.

- Subject to availability the UK Space Agency can provide a short “Who are we and why are we interested in commercial microgravity?” style opening presentation at each workshop.

Write a minimum of three articles focussing on the UK as a European Centre for Microgravity commercialisation for publication by the UK Space Agency Comms team.

- These articles will need to be approved by the UK Space Agency Applications team and Comms team prior to publication.
- The articles will need to be submitted to the UK Space Agency a minimum of three working days before publication for review and approval.

To work with all the UK Ambassador Platform for the ESA BASS programme to understand how to engage the regions in the microgravity community.

Governance

The successful supplier will provide a short report of activity each month including issues and prospects, no longer than one side of A4.

The successful supplier will provide a progress report at the halfway point, and at the end of the agreement, providing details of all activities undertaken, including successful and unsuccessful prospects within the commercial sectors.

Payment

All payments will be in accordance with the Terms and Conditions for payment in the resultant contract. The successful supplier will submit an invoice to the UK Space Agency along with supporting evidence, and the UK Space Agency will pay the invoice within 30 days. All payments will be made via BACS transfer.

Terms and Conditions

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

The evaluation and if required team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required. After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ($5+5+6=16 \div 3 = 5.33$))

Pass / Fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	SEL2.10	Cyber Essentials
Commercial	SEL2.12	General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Maximum Budget
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
-	-	Invitation to Quote – received on time within e-sourcing tool
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

Scoring criteria

Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	40%
Technical	PROJ1.1	Understanding	20%
Technical	PROJ1.2	Methodology	15%
Technical	PROJ1.3	Implementation	15%
Technical	PROJ1.4	Risks, Dependencies and Assumptions	10%

Evaluation of criteria

Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling

	in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.
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All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

Your final score will $(60+60+40+40) \div 4 = 50$

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: $\text{Score/Total Points} \times 50$ ($80/100 \times 50 = 40$)

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

Section 6 – Evaluation questionnaire

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on completion of the questionnaire is available at
<http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

What makes a good bid – some simple do's 😊

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay, is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the Delta eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

What makes a good bid – some simple do not's Ⓜ

DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.18 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.19 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed word counts, the additional words will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via e-sourcing tool. Responses received by any other method than requested will not be considered for the opportunity.

Some additional guidance notes

- 7.25 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Delta eSourcing, Telephone 0845 270 7050
- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the Delta eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Delta eSourcing Portal.

- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.
- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the Delta eSourcing Portal.
- 7.42 All Central Government Departments and 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 Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

- 7.43 The Government introduced its new Government Security Classifications (GSC) classification scheme on the 2nd April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

USEFUL INFORMATION LINKS

- [Contracts Finder](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

EXPENSES POLICY

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Summary Table of Rates

Section	Description	Relevant Rates	Reference
Accommodation	Hotel rates	£140 London and international	4.2.1
Accommodation	Hotel rates	£100 outside London (UK)	4.2.2
Accommodation	Incidental expenditure for overnight room charges, laundry newspaper etc.	up to £5 per day UK, up to £10 per day overseas	4.10
Air Travel	Economy Class	<3.5hrs flight time	5.8.1
Air Travel	Premium Class	3.5hrs to 5.5hrs flight time	5.8.2
Air Travel	Business Class	>5.5hrs flight time	5.8.3
Rail Travel	Oyster cards to be used around London	Oyster or Contactless rate for journey rather than top-up value.	6.2
Rail Travel	Eurostar	Standard Class Advanced ticket	6.7
Rail Travel	Eurostar, with line manager approval	Fully flexible business	6.7
Rail Travel	Advance open return	Standard Class flexible ticket	6.8
Rail Travel	Permitted under certain exceptional circumstances.	First Class	6.10
Subsistence	Breakfast (early start) costs receipted.	£5 benchmark (UK and overseas travel outside of Europe and North America) £10 benchmark (Europe and North America) ¹	7.4
Subsistence	Lunch costs receipted	£5 benchmark (UK and overseas travel outside of Europe and North America) £15 benchmark (Europe and North America)	7.7
Subsistence	Dinner costs receipted	£15 benchmark (UK and overseas travel outside of Europe and North America) £25 benchmark (Europe and North America)	7.10
Subsistence	Staying with friends and family	£5 Lunch and £15 Dinner (£20 limit per 24hr period) – requires line manager approval.	7.13
Car and Motorbike Travel	Car journeys ≤10,000	45p per mile	8.10.1
Car and Motorbike Travel	Car journeys >10,000	25p per mile	8.10.2
Car and Motorbike Travel	Per passenger supplement	5p per mile	8.10.3
Car and Motorbike Travel	Motorbike journeys	24p per mile	8.22.1
Professional Subscriptions	HMRC list of tax deductible professional subscriptions	No limit	10

¹ There are specific Europe and North America benchmarks to reflect the higher cost of subsistence when travelling to Europe and North America on behalf of the Department. Whilst other countries may have similar costs, less regular travel and the flexibility of the Expenses Policy means that it is not appropriate to set specific benchmarks for these countries. Staff travelling to these countries are able to exceed the benchmarks subject to the provisions of the policy being met.

1 Introduction

- 1.1 This Expenses policy, 'the Policy', sets out the principles and rules for reclaiming costs (travel, subsistence and other expenses) that Department of Business Energy and Industrial Strategy (BEIS) staff may incur during the course of delivering departmental business as part of their employment.
- 1.2 This policy covers civil service staff, special advisors and non-executive board and committee members. This policy does not cover Ministers.
- 1.3 The principles of the policy are set out in Section 2. The key principles of the policy are also highlighted below:
 - 1.3.1 BEIS never intends for staff to be out of pocket because of official business. Compliance with this policy should always mean staff are reimbursed the costs they have incurred.
 - 1.3.2 When incurring costs we are expending public money and all that we do must be guided by ensuring we deliver value for money (see *Managing Public Money*²).
 - 1.3.3 When incurring costs we must consider the reputational impact of our spend, as well as the financial implications.
- 1.4 On an exceptional basis, third parties (such as one-off speakers at BEIS events who are not remunerated but where the Department has pre-agreed to pay for limited expenses incurred) may make claims under this Policy using the third-party expenses form. If claims will be made regularly, such persons should be added as a supplier to Oracle and payments should be made using purchase orders.
- 1.5 The Civil Service Code states that civil servants must "make sure public money and other resources are used properly and efficiently". The [Civil Service Management Code](#) sets out specific guidance on the principles that all departments should apply to expenses. This policy is consistent with both codes.
- 1.6 Nothing in this policy takes precedent over the reasonable adjustments requirement for staff set out in the Equality Act 2010. If staff are concerned that they may not be able to claim expenses, parameters exist for Directors and Director Generals to approve exceptional expense spend within the bounds of the *Civil Service Management Code*³ and *Managing Public Money*².
- 1.7 It is the responsibility of all members of staff who are making or approving a claim (as part of line management responsibilities) to familiarise themselves with this policy and ensure claims comply with it.
- 1.8 It is very important to comply with this Policy – both as regards what and how staff claim, including record-keeping and authorisation. Expenditure of this type is subject to robust internal and external review and failure to comply with the Policy may result in disciplinary proceedings being brought against staff, which, in extreme circumstances, may result in dismissal. All instances of non-compliance will also be reported to Directors in the first instance before being reported to the Performance, Finance and Risk Committee.
- 1.9 If, as an approving manager or member of staff making a claim, you are uncertain over whether you should be making or approving a claim, or are unclear on some aspect of this policy, ask the [UKSBS travel team](#) for clarification.

² See *Managing Public Money* Paragraph 2.4, 4.5, 4.9 and Annex 4.8.

³ See *Civil Service Management Code* Chapter 8.

- 1.10 BEIS never intends for staff to be out of pocket because of official business. Expenses are intended to reimburse staff for justifiable additional costs that are actually and necessarily incurred whilst undertaking official business. Staff are expected to exercise reasonable use of public money at all times, with no intention of private gain.
- 1.11 Public perception is important – do not claim anything that you could not defend if challenged. Transparency is applied to this type of expenditure through FOI requests, Parliamentary Questions and publication rules.
- 1.12 This policy includes a series of benchmarks that staff should always seek to meet or spend less than. Where this is not possible Line Managers should judge the reasonableness of claims with supporting receipts and provide specific approval for claims which exceed the benchmarks.⁴ Either line management's written authorisation should be attached to the claim in Oracle⁵, or line managers may add a line responding in the 'Note' section of the claim approval screen (or auto-generated approval email) to the effect that 'I acknowledge expenditures in excess of benchmark rates in this claim and approve them as reasonable in the circumstances'.
- 1.13 Where expense claims are taxable the taxable expense claim form should be used (as opposed to iExpenses or non-taxable expense claim forms). Taxable expenses include expenses paid for staff attendance at Royal Garden parties, passport fees (see 12.7), and purchase of formal wear (see 13.28). Please refer to the form for more details on taxable expenses.
- 1.14 When travelling overseas staff should refer to Departmental guidance on safety when travelling abroad (available [here](#)) and [FCO travel advice](#) for the destination country. Pre-deployment risk assessments should consider the best method of travel overseas (further advice may be sought from the Department's Security team and the [Health, Safety and Wellbeing team](#)).
- 1.15 Guidance on the use of iExpenses is available to all on the UKSBS Bridge (guidance available [here](#); quick reference cards available [here](#)). Information on how to scan expense receipts and attach them to Oracle is also available on the BEIS Intranet (scanning [here](#); attaching to iExpenses [here](#)).

⁴ Examples of instances where staff may be unable to meet the benchmarks in the policy include instances where they are travelling to high-cost countries, or where they have specific dietary needs which mean that they need to pay more for breakfast, lunch and dinner.

⁵ Written authorisations for claims which exceed benchmarks can be given either on a claim-by-case basis, or through a standing letter. Standing letters should be given for specific locations (for example, frequent travellers to Brussels may have a standing letter approving claims in excess of the European rates).

2 Principles

- 2.1 Before staff commit the Department to expenditure under this Policy, each member of staff has a duty to consider the following questions:
 - 2.1.1 Do I have to make this journey at all?
 - 2.1.2 Do I need to attend the meeting in person, or can the work in question be taken forward by video conference or teleconference?
 - 2.1.3 If I must travel, how can I maximise the business benefits of this journey – for example, can I schedule other meetings with colleagues at that location on the same day?
- 2.2 All travel bookings should be first attempted through the Department's designated travel agent, Corporate Travel Management (CTM). In the event that a member of staff becomes aware that a better price is available outside of the travel booking system, CTM should be alerted and given the opportunity to price match. However, if CTM cannot match (and the price is more than 5% cheaper than CTM's quote), they may book this directly and claim reimbursement. The difference should be evidenced with screen prints, including communications with CTM showing that they were unable to price match.
- 2.3 Staff should claim expenses within three months of incurring the costs, but always attempt to make the claim as soon as possible. All expenses should be accompanied by a receipt except where specific exemptions are included in the policy. If receipts are not available other evidence (e.g. a bank statement) is allowable subject to Line Manager approval. Both claimants and their line manager must ensure that adequate audit evidence is provided to ensure we can satisfy our auditors (Government Internal Audit Agency and the National Audit Office).
- 2.4 Any beverages paid for out of public funds must be non-alcoholic.
- 2.5 Always seek to book your journey at the earliest possible opportunity to take advantage of cheaper tickets, subject to 2.7 below.
- 2.6 BEIS does not authorise advanced payment of expenses. Staff may apply for a Government Procurement Card if they have no other way to fund travel expenses.
- 2.7 Generally, it offers better value for money to purchase non-flexible tickets for set time travel (e.g. rail tickets or advanced hotel bookings). Where a reasonable degree of uncertainty exists, either on timing or occurrence, staff should ensure that travel tickets and hotel bookings are refundable.
- 2.8 Staff should book the most efficient journey considering their time, ticket costs and method of travel. Guidance should be sought from Line Managers in advance if necessary.
- 2.9 BEIS has made specific commitments to reduce the environmental impact of Departmental business. Staff should always try to minimise the environmental impact of their journey. Quotes from CTM show carbon emissions which may be used to measure each journey's environmental impact.
- 2.10 BEIS never intends for staff to be out of pocket because of official business. Compliance with this policy should always mean staff are reimbursed the costs they have incurred. In the event expenses are not covered by this policy the BEIS Chief Financial Officer (CFO) and one Director General may jointly authorise expenditure to be reimbursed if they are satisfied that the expenses were properly incurred during the line of business and were unavoidable. Please contact [Internal Control](#) in the first instance if you wish to seek approval for expenses not

covered by the policy prior to approval being sought from the BEIS CFO and a Director General.

- 2.11 Where potential policy violations require specific additional Line Manager's approval, or where policy benchmarks have been exceeded, staff should attach (in the same manner as their receipts) a copy of the email providing their Line Manager's approval (Grade 7 and above). Alternatively, line managers (Grade 7 and above) may include benchmark approvals in the 'Note' section of the claim approval screen or auto-generated approval email.
- 2.12 BEIS does not pay for the costs staff may incur in their journey from home to their normal place of work (unless a specific "reasonable adjustment" has been pre-authorised). For tax purposes "Home" is not considered a permanent place of work, with any costs from home to a permanent place of work considered a taxable benefit by HMRC. Appendix A explains this in more detail and is particularly relevant if considering a journey that partly coincides with normal travel to work.
- 2.13 There may be serious tax implications for both staff and BEIS if the stipulations of this policy are not observed fully.

3 Responsibilities

- 3.1 There are certain responsibilities upon both claimants and Line Managers authorising expense claims because every civil servant has a duty to uphold the principles of the civil service⁶, in addition to complying with the law.
- 3.2 Within BEIS the responsibility for budget control, and therefore for approving expenses, is held at Senior Civil Servant (SCS) level. With respect to expense approval, this may be delegated to lower grades by the SCS Budget Holder.

As Line Manager and Expense Approver

- 3.3 Budget Holders, and Line Managers in their team, must only commit expenditure from within their budgets.
- 3.4 Expense Approvers have a responsibility to check and approve expenses incurred by staff in their budgets.
- 3.5 When an Expense Approver signs an expense claim they are certifying that the expenses are:
 - 3.5.1 compliant with this Policy;
 - 3.5.2 properly incurred in the line of business;
 - 3.5.3 due for reimbursement; and
 - 3.5.4 evidenced by receipts except where specific exemptions apply.
- 3.6 An Expense Approver's signature (including electronic "signature" through the action of submitting 'Approve' on the expense claim) certifies that the claim has been reasonably checked for fraud or misappropriation. If an Expense Approver suspects a claim is fraudulent they should not alert the claimant, and should instead immediately raise the concerns with the BEIS counter-fraud team (counterfraud@beis.gov.uk) and seek advice.
- 3.7 Expense Approvers may set up vacation workflows which redirect expense claims to alternate approvers for their cost centre during periods of absence, although the Expense Approver remains ultimately accountable under such arrangements.
- 3.8 Claimants may select alternative approvers for their cost centre if their pre-selected approver is absent from work. However it is important to check whether the alternate approver has approval rights on the originator's cost centre before doing so.

As Claimant

- 3.9 Staff must always ensure that their expense claims are:
 - 3.9.1 incurred within the line of business;
 - 3.9.2 free from fraud (you should also alert Internal Control of any erroneous under or overpayments as soon as you become aware of them);
 - 3.9.3 within the letter and spirit of *Managing Public Money*⁷ and the *Civil Service Management Code*⁸; and
 - 3.9.4 supported by receipts except where specific exemptions apply.

⁶ See *Civil Service Code* and *Civil Service Management Code*.

⁷ See *Managing Public Money* Paragraph 2.4, 4.5, 4.9 and Annex 4.8.

⁸ See *Civil Service Management Code* Chapter 8.

4 Accommodation

- 4.1 If you are required as part of your BEIS duties to stay overnight prior to or after a meeting that is a significant distance from your home or work, you may make a claim for accommodation costs.

Hotels

- 4.2 Hotels should be booked through CTM except where there is a clear value for money case for alternative arrangements, or where security reasons prevail. The following nightly rates should be used as a guide, but may be exceeded in order to meet the requirements of section 4.4 below:

4.2.1 London and international: £140

4.2.2 Elsewhere (UK): £100

- 4.3 A further benefit of using CTM is that the Department will be able to contact you more easily in an emergency, and alternative accommodation may be able to be arranged at short-notice if required.

- 4.4 Staff should ensure the hotel that they book is of a suitable standard while traveling on departmental business. This should include due consideration of personal security. A guide for hotel standards is as follows:

4.4.1 Hotel should be a minimum 3* rating.

4.4.2 En-suite facilities including shower or bath.

4.4.3 Bed & Breakfast (BB) and Room Only (RO) board basis available.

4.4.4 Rooms guaranteed for late arrival. Wherever possible, rooms should not be on the ground floor or above the sixth floor.

4.4.5 City hotels should have good access to public transport and/or be close to meeting venues.

4.4.6 Hotels should be in a safe area. When travelling outside the EU or America, Australia, New Zealand or Canada, staff should only use overseas hotels which are approved by the local UK mission. They should approach the relevant FCO overseas security manager for a list and wider security advice before travelling.

4.4.7 If an individual arrives late, the hotel should have provision to provide a hot meal.

4.4.8 Free cancellation up to 2pm on Day of Arrival for most bookings (however, some properties will require a longer cancellation notice period).

- 4.5 If the hotel does not provide the 'bill back' service staff may claim with supporting receipts.

- 4.6 The use of AirBnB or similar intermediary companies for accommodation is currently not permitted under the expenses policy due to safety and security concerns for staff.

Staying with Family and Friends

- 4.7 As of 6 April 2016, HMRC removed dispensation for overnight stays with friends and family. Any payment made under such arrangements is now subject to deductions for tax.

- 4.8 Therefore if you are able to stay with family or a friend rather than a hotel, compensation payments are limited to subsistence claims (see section 7 Subsistence).

Accommodation Provided as Part of a Contract

- 4.9 Accommodation reimbursed as part of your employment contract is considered a taxable 'benefit in kind' by HMRC. Payments of this type must be made through payroll as part of staff remuneration with appropriate deductions for PAYE and NI.

Incidental Expenditure

- 4.10 Incidental overnight expenses are personal (non-business) expenses incurred by an employee when travelling overnight on business.
- 4.11 Staying overnight in a hotel may prevent you doing activities normally undertaken at home, such as laundry or newspaper delivery. To compensate, up to £5 a day may be claimed in the UK and up to £10 a day may be claimed overseas, where supported by receipts.⁹
- 4.12 Food and drink should not be claimed as incidental expenditure (e.g. coffees / mini bar drinks / low-cost snacks). Instead, these should be claimed as subsistence (see section 7).

⁹ The different UK and overseas rates are set by HMRC. As these are limits (rather than benchmarks) these cannot be exceeded through claimant and line management discretion.

5 Air Travel

- 5.1 Air travel makes a significant contribution to climate change and can be more expensive than surface travel. Staff must carefully consider the need, the full cost (including travel between airports and offices) and the travel alternatives before booking flights. CTM should be used for air travel bookings.
- 5.2 Air miles and similar benefits earned through official travel should not be used for private purposes. If you are in receipt of air miles or other frequent flier scheme rewards earned for business travel, your points can be used for official purposes to “purchase” enhanced facilities such as seat upgrades and, as a member of such a scheme, you may also use certain facilities such as special departure lounges and priority booking arrangements.

Domestic (UK) Air travel

- 5.3 Within the UK, the Department encourages rail travel wherever practical, due to its lower environmental impact. However, if other factors, such as time and cost, are judged to outweigh the environmental benefits, then domestic air travel is acceptable.
- 5.4 Staff should travel by economy class unless there are reasonable adjustment reasons that make this inappropriate.
- 5.5 Any non-economy class UK air travel must be approved in writing by your Line Manager (Grade 7 or above) before any booking is made.

International Air Travel

- 5.6 Staff with a health condition who are unable to secure suitable facilities in economy class may travel premium or business class.
- 5.7 Staff that are able to purchase a cheaper premium or business class ticket than an economy ticket for the same journey may also travel premium or business class (a copy of the price comparisons must be printed and submitted with the expense claim).
- 5.8 To determine what class of ticket staff may purchase, follow the guidance below:
 - 5.8.1 If the flight is less than 3.5hrs only an economy ticket is permitted (subject to 5.6).
 - 5.8.2 If the flight is greater than 3.5hrs but less than 5.5hrs, a premium economy ticket may be claimed.
 - 5.8.3 If the flight is greater than 5.5hr (intercontinental) a business class ticket may be claimed.
- 5.9 You may only claim for excess baggage if you are due to be away from your home office for longer than 1 month.
- 5.10 The Department recognises that long air journeys across time zones can negatively affect efficiency, judgement and concentration. Staff are not expected to start work immediately following such a journey. Staff are allowed a period to acclimatise after journeys greater than 3.5hrs. The period of acclimatisation necessary is dependent on each individual. BEIS policy of allowing premium and business class flights for longer flights is designed to ease the transition between countries. Staff should discuss the reasonable period of acclimatisation with their Line Manager prior to booking and, once agreed, incorporate this into their schedule.

6 Rail Travel (Incl. Transport for London and Eurostar)

- 6.1 Rail travel is BEIS preferred method of transport due to the options available for cheap advanced tickets, journey comfort for staff and having a relatively low environmental impact compared with other forms of transport. CTM should be used for rail bookings (except on TfL where Oyster cards and contactless payment methods are also permissible).

Oyster Card and contactless payment journeys (TfL)

- 6.2 Underground tickets can be purchased through CTM when making an inter-city rail booking. Staff and/or teams who make regular trips to or around London should use an Oyster card or contactless payment method.
- 6.3 If using a personal 'pay as you go' Oyster card for business travel, you should only claim for the cost of the actual journey and not the round sum you may have paid to top up. Journey statements confirming the route and cost are available by [registering your Oyster card](#). Either the Oyster card statement or a print screen from the Oyster app should be submitted with the claim for reimbursement. If staff are concerned about having outstanding balances on their Oyster card after they have topped it up for work purposes, they can use 'contactless payment' methods (see 6.4), or purchase underground tickets through CTM (see 6.2).
- 6.4 Transport for London offer 'contactless payment' through a debit or credit card in place of an Oyster card. You can [create an account](#) and register your debit/credit card or link a debit/credit card to your current Oyster account. Journey statements will be available and should be submitted with the claim for reimbursement.
- 6.5 If you purchase an Oyster travelcard, for a week, month or year, as part of your personally funded journey to and from work (i.e. commuting to/from home and your normal place of work), only legitimate business journey expenses above the cost of the travel card may be reimbursed (these journeys may be charged to your card as part of 'pay as you go').
- 6.6 If staff travelling on behalf of the Department do not already have an Oyster travel card, and do not have a contactless payment method available to them, they are able to purchase an Oyster travel card and claim the costs back from the Department. However, if they return the Oyster travel card back to Transport for London for a refund, or leave the Department, they must pay back the cost of the Oyster travel card to the Department.

Eurostar

- 6.7 When travelling by Eurostar BEIS encourage you to book standard tickets in advance and, where possible, to purchase non-flexible tickets balancing the likelihood of meeting cancellation. Eurostar offer Standard, Standard Premier and Business Premier ticket classes and prices vary with demand for the service. The most economical tickets should always be purchased, therefore Standard premier and Business Premier may be purchased with written authorisation from you Line Manager.

Other Rail Travel

- 6.8 Staff should always seek to book standard class rail travel.
- 6.9 Staff should book a ticket that offers a refund in the event of business meeting cancellation, or anytime open tickets. While cheaper tickets for set times may be booked, staff should be

satisfied that meetings are very unlikely to be cancelled and that the savings secured more than balance any increased risk of wasted expenditure.

- 6.10 By exception first class travel is permitted where the Department is satisfied that:
- 6.10.1 it would constitute a “reasonable adjustment” under the Equality Act;
 - 6.10.2 a temporary “reasonable adjustment” is required e.g. due to injury or pregnancy related, or a condition where it will impact safety or cause a worsening or adverse effect on the condition;
 - 6.10.3 if there is no standard class available, but the trip is essential;
 - 6.10.4 there are justified concerns about security; and/or
 - 6.10.5 this is necessary in order to support a Minister who is travelling first class.
- 6.11 Approval for booking first class travel should be sought from your Line Manager (Grade 7 or above) prior to making the booking.

Railcards

- 6.12 Staff are able to reclaim the cost of railcards if there will be an overall saving to BEIS for the duration of the railcard (i.e. if the combined cost of the railcard and legitimate business journeys travelled is less than the cost of journeys travelled had a railcard not be purchased).
- 6.13 To ensure that an overall saving to BEIS is achieved, staff must complete a request template ([available here](#)) for pre-approval from their line manager. Railcards cannot be reclaimed unless this is completed and approved prior to purchase (the Department will not reimburse those who already hold railcards). Once the railcard has been purchased, the pre-approved request template must be attached to the iExpenses claim form.
- 6.14 The Department will not pay for railcards for staff who are due to leave the Department in the next 12 months (e.g. staff on fixed term contracts, or those who have handed in their notice).
- 6.15 Railcards can be used when booking travel on CTM, for eligible journeys.
- 6.16 The types of railcard which can be reimbursed by the Department include 16-25 Railcard, 26-30 Railcard, Network Railcard, Senior Railcard, Disabled Persons Railcard and Armed Forces Railcard.
- 6.17 The Department will not reimburse the Two Together Railcard or Family and Friends Railcard as their eligibility criteria means they are not relevant for business purposes.

7 Subsistence

- 7.1 Subsistence is provided for staff working away from home where there is no reasonable opportunity to cook meals as normal. Rates for breakfast, lunch and dinner are shown as benchmarks that staff should always seek to meet or spend less than. It is permissible for staff to “flex” the benchmarks (e.g. having a nominal lunch but a larger evening meal), although iExpenses will still require staff to follow the excess benchmarking process set out in section 1.12.
- 7.2 The Department recognises that this is not always possible to stay within benchmark rates and Line Managers should judge the reasonableness of claims with supporting receipts (see 1.12).
- 7.3 Any beverages paid for out of public funds must be non-alcoholic.

Breakfast (early start from home)

- 7.4 Rather than staying overnight, the Department recognises that staff will sometimes leave their home earlier than normal to travel to different offices for meetings (i.e. not their normal place of work). Receipted claims, using a benchmark of £5, may be made where staff leave home 90 minutes earlier than usual to attend the meeting. (The benchmark for breakfasts overseas in Europe and North America is £10.)

Breakfast (after overnight stay)

- 7.5 When staying overnight in a hotel, breakfast costs in that hotel may be significantly higher than the £5 (or £10 in non-UK Europe / North America) benchmark rate in 7.4. These rates do not therefore apply to overnight stays. Staff should ensure that they consider value for money when making hotel bookings (it may be cheaper to book breakfast within the room rate). Staff should ensure any breakfast costs are always included in the final hotel invoice, either for reimbursement, or direct bill back to the Department.

Lunch

- 7.6 Staff that are absent from their normal place of work (office or home based) to attend a meeting or other business-related matters may claim for lunch allowance.
- 7.7 The benchmark for lunch claims is set at £5. (The benchmark for purchases made in non-UK Europe and North America is £15.) The actual amount claimed must be supported with receipts.
- 7.8 The benchmark amount stipulated in 7.7 (and 7.10) is expected to be sufficient for costs across the UK and for most UK cities. However the department recognises that greater costs are sometimes unavoidable e.g. due to higher living costs in some countries. These should be receipted and your Line Manager (Grade 7 or above) should consider their reasonableness, including the cost of living of the place where they were incurred, when authorising your claim.

Evening Meals

- 7.9 Dinner, or evening meal, allowance may be claimed when staying overnight on official business (coinciding with a hotel booking unless personal arrangements have been made).

- 7.10 A benchmark dinner expense of £15 per night may be claimed by staff who are absent from home overnight on official business. (The benchmark for purchases made in non-UK Europe and North America is £25.) The actual amount claimed must be supported with receipts.
- 7.11 Section 7.8 applies to the evening meal rate.

Gratuities on Meals and Subsistence

- 7.12 See section 13.21

Subsistence while Staying with Relatives

- 7.13 If you make your own accommodation arrangements e.g. with friends or relatives, you may claim up to £5 for lunch and up to £15 for an evening meal. Where receipts are not available, prior approval should be sought from your Line Manager.

Subsistence claims for colleagues

- 7.14 Staff may make expense claims for subsistence for themselves and colleagues where they have paid for colleagues' subsistence. However, they must ensure that they name each attendee in their expenses claim to ensure an adequate audit trail. Duplicate claims (where both members of staff claim for the same meal are strictly prohibited).

8 Car and Motorbike Travel

- 8.1 Unless travelling as part of a group, car travel is not a favoured form of transport for BEIS staff. When travelling as a group, staff may share journeys for greater efficiency.
- 8.2 Business mileage refers to journeys undertaken by staff in the course of their work, excepting staff member's normal commute. See the guide in Appendix A: Business Mileage for further information.

Taxi

- 8.3 The use of licensed taxis is permissible where:
 - 8.3.1 staff travelling alone or in small groups feel more secure than taking public transport;
 - 8.3.2 FCO travel advice warns against the use of public transport or walking. Note that bicycle, motorcycle or tricycle taxis must never be used. Where FCO travel advice warns against the use of all taxis, transport must be arranged through the local UK mission or (if cleared through the local overseas security manager) hotel transport may be used;
 - 8.3.3 this is an appropriate reasonable adjustment (this includes journeys to work where agreed with HR); and/or
 - 8.3.4 it is the most economical transport available considering journey time or number of travellers.
- 8.4 Platform-based licensed private vehicle hire services and licenced mini-cab services can be used unless Security advise is against this. When travelling overseas, advice should be sought from the local UK mission as to which type of licensed taxi and hire services should be used (note that Uber should not be used in Beirut). Pre-deployment risk assessments should consider the best method of travel (further advice may be sought from the Department's Security team).
- 8.5 Unlicensed mini-cab services are not permitted on security grounds and claims should not be authorised by Line Managers.
- 8.6 See section 13.21 in respect of gratuities on taxi fares.

Own Car

- 8.7 When considering the use of a private car for legitimate business travel, staff should balance the cost against the benefit of using their own car or public transport, taking into account staff fatigue from driving as part of a sensible risk assessment.
- 8.8 Staff may use their own car in situations where this provides them with a reasonable adjustment.
- 8.9 Staff travelling by car are expected to share the journey with other staff for efficiency. A supplement is payable per passenger.
- 8.10 The prevailing HMRC reimbursement rates will be paid for journeys made. At the time of writing these were:
 - 8.10.1 45p per mile for the first 10,000 miles per year;

- 8.10.2 25p per mile for mileage above 10,000 miles per year; and
- 8.10.3 5p per mile for passenger supplement.
- 8.11 Staff are responsible for the good working order of their car, compliance with MOT regulations, and suitable insurance for work purposes. Most basic insurance does not cover work-related travel. Third Party, Fire and Theft insurance is not considered sufficient by BEIS for business-related journeys. BEIS does not reimburse the cost of additional insurance for staff.
- 8.12 Staff are responsible for compliance with road traffic laws and regulations. BEIS will not refund traffic fines of any sort. Staff found guilty of breaking road traffic laws while driving on official business may be subject to disciplinary proceedings.
- 8.13 Staff should not drive their own car overseas (see paragraph 8.16 for an explanation of the risks relevant to overseas driving).

Hire Car

- 8.14 Where travelling by car in the UK is the most economical travel method for legitimate business journeys, hire cars are permitted.
- 8.15 Staff may use a hire car in the UK in situations where this provides them with a reasonable adjustment. Information on BEIS' car hire contract is available [here](#).
- 8.16 Staff are advised against driving hire cars overseas as driving standards and road conditions may be different and official trips overseas tend to be of short duration, limiting the opportunity for acclimatisation to local traffic. Embassy transport or (where appropriate) registered taxis should be used as an alternative. Where staff feel that there is absolutely no alternative to driving a hire car overseas, they must submit a business case to, and seek authority from, the Department's Senior Security Advisor: staff are prohibited from driving cars overseas without this authority.
- 8.17 Car hire is normally conducted on a bill back basis to the department. Therefore expense claims should not, in general, be made. In the absence of a hire company bill back service quotations for costs should be approved in writing by Line Managers before committing expenditure.
- 8.18 Costs are reimbursed on the basis of the invoice from the hire company, and any additional fuel receipts (as opposed to mileage rates) related to your journey.
- 8.19 Staff should ensure that they read and adhere to the contractual terms and conditions of the hire car lease.
- 8.20 The Department is unable to reimburse any penalties or charges in relating to traffic offences, parking penalties and penalties relating to the non-payment of congestion charges or tolls, this includes any related administrative charges levied by the hire car company.
- 8.21 Fuel costs for hire cars are claimed by provision of a receipt (rather than claiming mileage) as it is typical for hire car companies to require cars to be returned with a full tank of fuel. Staff should provide an overview of journeys travelled as part of their claim and are prohibited from using hire cars for personal use.

Motorbike

- 8.22 Costs for legitimate business travel by motorbike are claimable. The prevailing HMRC reimbursement rates will be paid for journeys made. At the time of writing this was:

8.22.1 24p per mile.

Bicycle

8.23 Costs for legitimate business travel by bicycle are claimable. Protective head gear must be worn and staff must be aware that they are using their own bicycle at their own risk (the Department may not be held responsible for compensation for theft while on business travel). The prevailing HMRC reimbursement rates will be paid for journeys made. At the time of writing this was:

8.23.1 20p per mile.

Tolls, Ferry Costs, Parking and Congestion Charge

8.24 Receipted costs for ferries, and toll bridges and roads unavoidably incurred during your business journey may be claimed.

8.25 Reasonable parking charges may be claimed.

8.26 Receipted congestion charges unavoidably incurred on your business journey may be claimed. Staff using hire cars are responsible for ensuring that the congestion charge is paid for the hire car (depending on the terms of the lease, either by the hire company or by the member of staff and reclaimed through expenses).

8.27 The Department is unable to reimburse any parking penalties and penalties relating to the non-payment of congestion charges or tolls, including any related administrative charges levied by the hire car company.

9 Working Meals and Official Business Entertainment

- 9.1 BEIS differentiates a 'working meal' from subsistence provided while working away from your normal office and home. (Please see section 7: Subsistence, for these types of claims.)

Meals with external parties

- 9.2 It is a recognised business practice to provide meals or refreshments for meetings with external parties that run over meal periods, where there is a clear benefit to BEIS. However, this should be balanced with the responsibilities upon civil servants within *Managing Public Money*¹⁰. Claims should always be justifiable, modest and defensible under public scrutiny.
- 9.3 Staff should refer to and comply with the Gifts Hospitality and Bribery and Corruption policy.
- 9.4 Claims for working meals or the provision of refreshments will only be allowed if all the following circumstances are met, although the Permanent Secretary or Chief Financial Officer may approve exceptions where appropriate:
- 9.4.1 When staff are working through a meal period, or meeting over meal periods as part of official BEIS business.
 - 9.4.2 The meeting must include external guests and must substantively take place during the meal period.
 - 9.4.3 The meal or provision of refreshments must take place as a necessary component of a meeting for the purpose of official business that has a total duration that justifies the provision of a meal or refreshments (typically two hours for a lunch or dinner meeting) and with external guests in attendance. ('External guests' in this context does not cover BEIS staff from other sites, other civil servants, staff from BEIS partner organisations, or BEIS Non-Executive Directors.)
 - 9.4.4 Any beverages paid for out of public funds must be non-alcoholic.
 - 9.4.5 Written approval must be obtained from your Senior Civil Servant line manager in advance. Only a modest meal or refreshment, which must be within the subsistence rates outlined in this Expenses Policy may be provided (see [section 7](#) for details of subsistence rates).

Meals with internal parties (such as Civil Servants) including team events and away days

- 9.5 Meals or refreshments may be provided for internal parties if all the following circumstances are met. ('Internal parties' in this context covers BEIS staff, other civil servants, staff from BEIS partner organisations, and BEIS Non-Executive Directors):
- 9.5.1 Staff are working during meal periods (typically lunch) as part of a meeting, team event or team away day for the purpose of official BEIS business.
 - 9.5.2 The meeting is in excess of 2hrs (for lunches the period between 12:00 and 14:00 must be covered).
 - 9.5.3 Any beverages provided must be non-alcoholic.
 - 9.5.4 The circumstance for providing the meal or refreshments is exceptional, not routine.
- 9.6 If these points are met and you have written approval from your SCS line manager in advance, then a modest meal or refreshment, which must be within the subsistence rates outlined in this Expenses Policy may be provided (see [section 7](#) for details of subsistence rates). This will

¹⁰ See Managing Public Money Paragraph 2.4 and Annex 4.8.

normally be only when some attendees have travelled, or there is some other constraint making it impractical to include a break for attendees to provide for their own meals.

10 Professional Subscriptions

- 10.1 Employees may claim the cost of annual subscriptions for up to a maximum of three professional bodies, provided that each body is on the HMRC approved list and its activities are directly relevant to the employee's duties. Staff should be aware that any subscriptions not paid by the Department may be claimed on personal tax returns. Further details can be obtained at: <https://www.gov.uk/tax-relief-for-employees/professional-fees-and-subscriptions>
- 10.2 The professional body must be included in the [HMRC approved list](#).
- 10.3 The subscription must be relevant to the role being undertaken by the member of staff.
- 10.4 Approval should be obtained from your Line Manager or the bursary scheme manager if you are reclaiming any subscriptions. Where there is uncertainty about the appropriateness of the claim please contact BEIS Internal Control (internalcontrols@beis.gov.uk) for advice.
- 10.5 Evidence of payment and receipt must be submitted with the claim.
- 10.6 A Government Procurement Card can also be used to pay for professional subscriptions (rather than claiming for the costs through expenses). The GPC holder should only make payment once they have received an invoice or equivalent with the member of staff's name and membership details on, and evidence (via an email) that the member of staff's line manager has approved the payment and that it is in line with policy. Both the invoice and line manager email should be attached to iExpenses.

11 Cancellation or Postponement of Annual Leave

- 11.1 In the event that your manager specifically requires your expertise for urgent, unforeseen work that conflicts with pre-agreed and pre-booked holiday as part of annual leave, you may be entitled to reclaim the costs you have suffered from the Department.
- 11.2 This provision extends only to actual costs incurred and is not intended to be used to compensate staff for inconvenience or to pay for the salary equivalent of annual leave.
- 11.3 Prior to any decision to cancel leave, approval must be given in writing, including a full cost breakdown, by your Director General. As with all expenses, claims must only be made retrospectively, and accompanied by suitable original third party documentation.
- 11.4 For the avoidance of doubt, the full direct costs that result from holiday cancellation may be reclaimable.
- 11.5 Such circumstances are expected to be truly exceptional and therefore managers are required to demonstrate that there was no management failing. The following steps should be taken.
 - 11.5.1 A full cost breakdown (third party documentation) of the losses that would be incurred through cancellation must be presented to a Director General prior to a decision being made.
 - 11.5.2 Director General should be presented with a timeline for annual leave approval, request and deadline for work to prove there has been no management failing. The Director General should be satisfied that there was no management failing in order to approve the claim.
 - 11.5.3 Director General approval to cancel and reimburse must be provided in writing prior to any decision being taken.

12 Additional Claims for Travelling Overseas

Overseas Travel Insurance

- 12.1 BEIS provides overseas medical insurance (see below) so claims for personal travel insurance are not normally reimbursed. Staff are encouraged to print out a copy of the emergency medical insurance cover details and take it with them when they travel on behalf of the Department. The cover details are available [here](#).

Personal Effects while Travelling

- 12.2 Please see Compensation for Loss of or Damage to Personal Property, in section 13.24.

Medical Travel Insurance

- 12.3 The Department's overseas medical insurance policy meets the costs of emergency medical treatment if you are injured or fall ill. See the [Health and Wellbeing intranet site](#) for more information. Additional insurance is required for some high-risk countries.
- 12.4 At the time of drafting this policy the high-risk countries were as follows, although advice should be sought from Security to make sure that the very latest FCO advice is observed:
- Afghanistan
 - Chechnya
 - Iraq
 - North Korea
 - Somalia
- 12.5 Contact UKSBS if you are travelling to the countries shown above to arrange suitable insurance.

Healthcare Prior to Travel

- 12.6 Vaccinations for travelling overseas should be made through the BEIS registered Health Management company. A direct bill back service means expense claims are not normally reimbursed except in the rare circumstances where the registered health management company are unable to provide the required service.

Passport Costs

- 12.7 Staff travelling overseas must have a valid passport. In the event that staff do not have and have never owned a full UK Passport, the costs associated with issuing a new passport may be claimed from the Department. Approval is required before entering into, or committing to, this process from your Finance Business Partner. Expense claims for passports are taxable and must be claimed for using the taxable expense claim form. Costs for renewing or replacing expired passports are not reclaimable from the Department.
- 12.8 Staff that are not UK nationals are responsible for ensuring their passport is up to date and valid.

Visa Fees

- 12.9 In the event that staff are travelling to a country that requires a visa with an associated cost, claims for reimbursement may be made.
- 12.10 If staff require a visa to work at BEIS, all arrangements and costs relating to extension must be arranged directly with HR and not claimed through personal expenses.

Spouse and Partner Overseas Travel

- 12.11 Overseas travel greater than one month duration is likely to involve a significant change of circumstances for staff. In the event that such circumstances are imposed on staff then consideration may be given for partner/spousal visits or funded return flights mid-way through the engagement. Each circumstance is unique and the SCS Line Manager should consider the full implications and costs when assessing the value for money of the engagement. The SCS Line Manager may make provision for one monthly visit of spouse/partner or return journeys for members of staff and additional clothing allowance where climatic change is significant.
- 12.12 Approval for such expense is required prior to the trip and in writing from both your Finance Business Partner and the BEIS Chief Financial Officer.

Emergency Travel

- 12.13 Sometimes employees travelling overseas may have to make emergency arrangements to travel home or to pay for in-country emergency accommodation. For medical emergencies, staff should first contact Chubb (BEIS's medical insurer) on their 24 hour emergency contact number quoting [the BEIS policy number](#). Chubb will then be able to arrange either the appropriate emergency medical care or repatriation back to a suitable hospital or their home address in the UK.
- 12.14 If you have one, your Government Procurement Card (GPC) could be used to cover other emergency expenditure. Specific transaction limits for GPC holders travelling overseas are available – please refer to the GPC policy for further details.

Further safety information for staff travelling overseas

- 12.15 Further information on safety when travelling abroad is available [here](#) and in [FCO travel advice](#) for the destination country, which must be read prior to travel overseas.
- 12.16 Some countries require staff to attend SAFE training prior to visiting (this course is a 3 day residential course). Further information is available [here](#).
- 12.17 Line Managers should also consider if staff should attend a Personal Safety course which can be arranged via the [Health, Safety and Wellbeing Team](#).

13 Other Expense Claims

Additional Costs for Out of Hours Working

- 13.1 In exceptional circumstances you may be asked to complete work by your Line Manager at short notice and with a short time frame, outside your team's core hours. Normally core hours are considered to be 7am to 8pm however your team may have different core hours which should be shown in your contract with BEIS. Prior to commencing the work you should discuss with your Line Manager any additional costs that you are likely to incur as direct result of the line management request. Examples include additional childcare or caring responsibilities, taxi fare home, or evening meals. Your Line Manager (Grade 7 or above) may then consider the cost-benefit of their request made to you. For additional costs incurred as a result of childcare or caring responsibilities, authorisation should be provided to you in the "reimbursement of additional child/dependent fees application and claim forms". Other claims should be made on iExpenses as usual. This point extends to staff training when held away from normal office location or on non-working days.

Postage Fees

- 13.2 Postage costs should be charged directly to your budget code from the Post Room when staff are business posting items from 1 Victoria Street. Personal postage is not claimable.
- 13.3 When staff are posting business items from offices other than 1 Victoria Street the costs should be receipted and claims for reimbursement may be made.

Dress Allowance

- 13.4 Allowance for clothing if staff are visiting very hot or very cold countries was available to staff under old policies. Given the seasonal swing in temperatures encountered in the UK it is not expected that additional clothing would normally be required by staff. In addition, offices in overseas territories commonly offer climatic control for their staff. However in exceptional circumstances, or where staff require specific clothing that may be classed as Personal Protective Equipment under Health and Safety Regulations, SCS Line Managers may authorise, along with Finance Business Partners an allowance for additional clothing on a case by case basis prior to costs being incurred.

Eye Test

- 13.5 A separate policy is published that covers eye tests, detailing the amounts to be paid/claimed for eye tests and those eligible for contributions to spectacles for monitor use. Staff should follow the procedures within that policy to claim for costs.

Mobile Phone Costs

- 13.6 All BEIS staff have a work mobile phone available for use. Therefore, costs for personal mobile phone use should not be claimed for except in exceptional circumstances.
- 13.7 You must immediately alert your Line Manager and BEIS IT if your phone is lost or stolen.

Printing

- 13.8 BEIS has a professionally contracted print function and this should be used for high quality office printing. If it is necessary to contract work to other companies this should be completed with a purchase order through UKSBS. If printing is required at home, or away from the office (normal place of work) costs for printing will be reimbursed with suitable receipts.

Publications

- 13.9 Publications and periodicals are expected to be purchased by teams within the Department through normal purchasing procedures rather than expenses. Therefore it is expected that staff will not claim for these expenses.

Interviews and Test Centres

- 13.10 It is no longer commonly expected that interview expenses and costs for attending test centres will be reimbursed by potential employers. Therefore the Department should not offer to reimburse expenses for attending interview or test centres.
- 13.11 In exceptional circumstances, for example where an overnight stay is required by the candidate, expenses may be reimbursed in line with Section 4 (Accommodation). Prior approval should be sought in writing by the Director of the recruiting directorate.

Relocation Expenses

- 13.12 Staff that are to be permanently transferred and have to move home as a result, or future staff that have to move to take up the offer of employment, may be eligible for reimbursement of relocation expenses.
- 13.13 Each case is treated individually, as the circumstances will be unique to each case.
- 13.14 There is a tax free limit of £8,000 stipulated by HMRC. Amounts above are likely to be liable for PAYE and NI. Finance Business Partners should always approve the costs before offers are made.
- 13.15 Note that this payment differs from ongoing support for the additional costs for traveling between your new home and your new place of work that may be payable to existing staff that must move. See 13.26.
- 13.16 The employee's or future employee's reason for relocation must be for one of the following reasons:-
- 13.16.1 they are starting a new job;
 - 13.16.2 there has been a change in their employment duties;
 - 13.16.3 there has been a change of the place where their duties are usually performed;
- 13.17 The expenses and benefits paid to the employee must be in at least one of six categories:-
- 13.17.1 the employee's sale of their former home
 - 13.17.2 the purchase of a new home
 - 13.17.3 transportation of the employee's belongings to their new home
 - 13.17.4 associated travel and subsistence costs
 - 13.17.5 domestic goods for the new home
 - 13.17.6 bridging loans in relation to the purchase of the new home

- 13.18 To qualify the costs must be paid before the end of the tax year in which the move took place. Further information is available from HMRC at the following link:
<https://www.gov.uk/expenses-and-benefits-relocation>
- 13.19 In all scenarios the case for payment of relocation expenses must be approved by the Finance Business Partner and the Human Resources Business Partner prior to offers being made.

Dual Location workers

- 13.20 Some employees may have more than one permanent workplace. Such arrangements have associated tax implications. A separate [dual location policy](#) is available on the intranet which provides more details on criteria for dual location arrangements and how dual location expenses must be paid.

Gratuities

- 13.21 Where gratuities are included and a recognised element of the cost of service, for example taxis and restaurants, a reasonable cost may be claimed. Reasonable costs in the UK are not expected to exceed 10% of the total cost relating to that expense (taxi journey or meal). Costs incurred in other countries should be judged by what is deemed reasonable in that city or country.

Official Gifts

- 13.22 If there is a need to purchase an official gift, in line with BEIS policy for Gifts, Hospitality, Bribery and Corruption (reciprocal gifts as part of cultural exchange), these may be claimed through expenses. Written prior approval should be sought from the BEIS CFO or Permanent Secretary
- 13.23 Gifts for colleagues as part of occasions, such as leaving, sickness or parenthood, is specifically exempt. These should be funded through collections/donations with other colleagues.

Compensation for Loss of or Damage to Personal Property

- 13.24 The Department has a specific policy, and claim procedure for personal property. Guidance notes are included within the claim form for staff (available on the intranet). Where staff have suffered a loss or damage they should refer to this guidance for reclaim. Note that the following is a summary of the claim guidance:

'Accidents happen and the fact that you are at work, on official duty away from the office or travelling to or from work when you experience loss or damage to your property is not sufficient reason to expect the Department to compensate you.'

'In some cases the Department may have a legal liability to compensate for loss or damage to officers' personal property. The Crown Proceedings Act 1947 puts the Department to all intents and purposes in the same legal position as a private employer. Each case will be examined on its merits and you should be aware that, as a rule, there is no liability on the Department to:

- prevent theft of an officer's personal property or*
- to compensate in respect of losses or damage due to defective furniture or locks if the defect is known to a member of staff who is expected to exercise reasonable care.'*

'Whether there is a legal liability to pay or not, the Department may at its discretion make compensatory payment to an officer whose personal property - other than luxury items (e.g. jewellery) is lost or damaged during the course of employment.'

Miscellaneous Office Expenses

- 13.25 Staff should not buy consumables for use at work (e.g. stationary, I.T. licences, software or hardware) and reclaim the cost through expenses. Government Procurement Cards are available for low value transactions when purchase orders are not warranted.

Permanent Staff Transfer (excess fare allowance)

- 13.26 The excess fare allowance that you may claim is based on the extra cost of travel between your new home and your new office. This is calculated, monthly in arrears and as part of your salary and will be notified well in advance to you by HR as part of a formal consultation period. Therefore claims for excess fare allowance should not be made through iExpenses.

Hire of Formal Wear

- 13.27 Staff may be asked to represent the Department at formal events, requiring evening dress. In such a scenario staff may claim a one-off amount of up to £100 towards either hire or purchase of formal wear, authorised by the SCS Line Manager.
- 13.28 Hired formal wear should be claimed for using iExpenses. Purchased formal wear is taxable and should be claimed for using the taxable expenses form.

Staff parties

- 13.29 The Department does not fund retirement / leaving / seasonal / other staff parties.

Appendix A: Business Mileage

HOME – DESTINATION 1

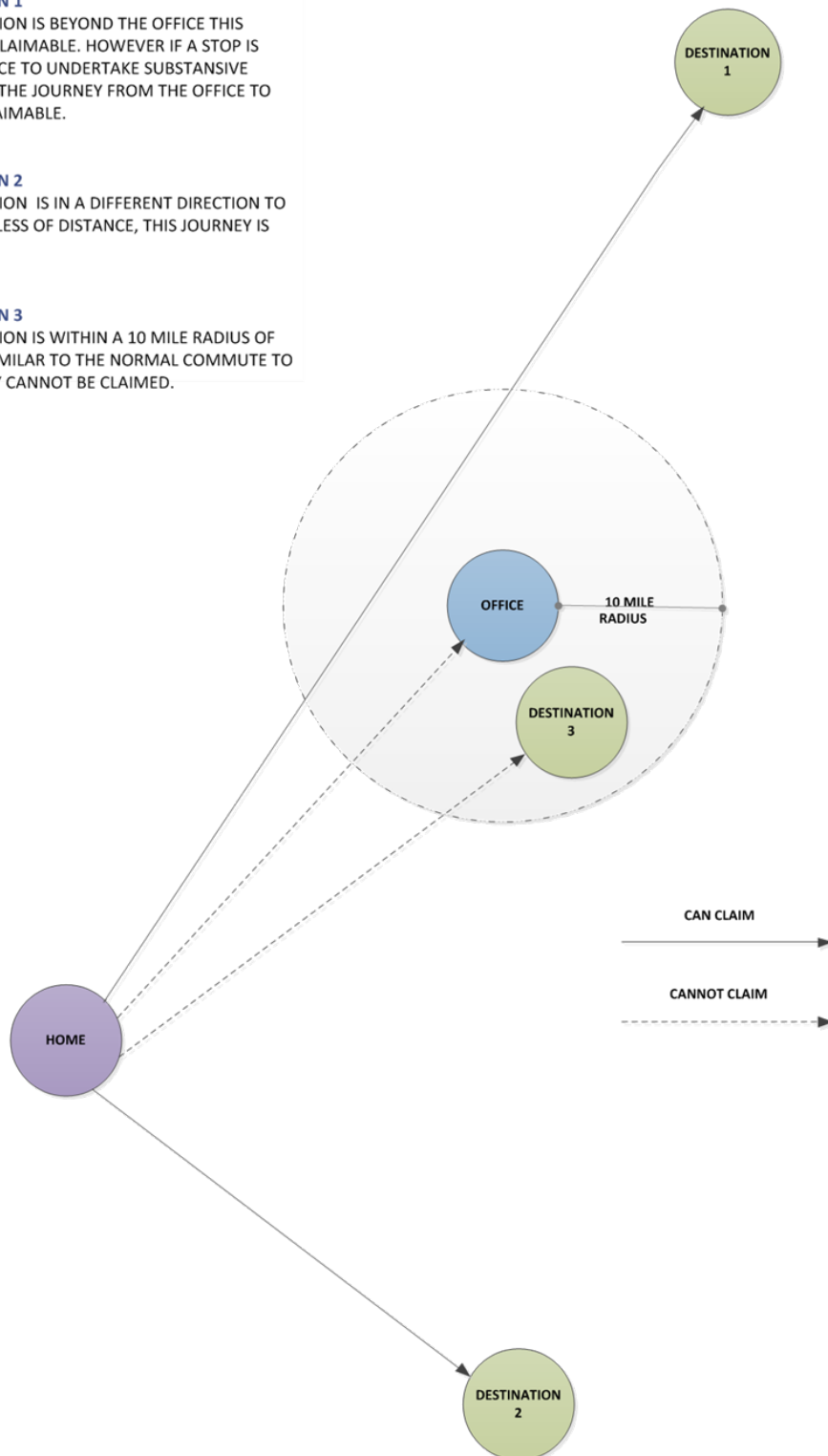
IF THE END DESTINATION IS BEYOND THE OFFICE THIS WHOLE JOURNEY IS CLAIMABLE. HOWEVER IF A STOP IS MADE INTO THE OFFICE TO UNDERTAKE SUBSTANSIVE DUTIES THERE, ONLY THE JOURNEY FROM THE OFFICE TO DESTINATION 1 IS CLAIMABLE.

HOME – DESTINATION 2

IF THE END DESTINATION IS IN A DIFFERENT DIRECTION TO THE OFFICE, REGARDLESS OF DISTANCE, THIS JOURNEY IS CLAIMABLE.

HOME – DESTINATION 3

IF THE END DESTINATION IS WITHIN A 10 MILE RADIUS OF THE OFFICE AND IS SIMILAR TO THE NORMAL COMMUTE TO WORK, THIS JOURNEY CANNOT BE CLAIMED.



Appendix B: Policy Administration

Policy approval/review dates

Finance:	March 2019
DG Corporate Services:	January 2019
Union representative:	Pending (provided 10 December 2018)
UK SBS:	December 2018
Shared Services:	December 2018
Security:	December 2018
People and Operations Committee:	16 January 2019
Policy owned by:	Financial Reporting and Control Team
Policy review date:	At least annually
Date policy in effect	28 January 2019

Support for this policy can be sought through contacting UK SBS by email: travel.queries@uksbs.co.uk or by phone: 01642 366114.