

# Mini Competition



## Department for Energy Security & Net Zero

**Mini Competition against an existing Framework Agreement (MC)  
on behalf of **Department for Energy Security & Net Zero****

**Subject: **Model Management and Data Analytics****

**Sourcing Reference Number: **BE24146****

**UK Shared Business Services Ltd (UKSBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

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

It is our vision to become the leading service provider for Contracting Authorities for 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.

UKSBS 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 DSIT / DESNZ & UKRI, UKSBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UKSBS currently manages £700m expenditure for its Contracting Authorities.

Contracting Authorities who have access to our services and Contracts are detailed [here](#).

### **Privacy Statement**

At UK Shared Business Services (UKSBS) 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 UKSBS 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 UK General Data Protection Regulation (UK 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**

As your personal data is stored on our IT infrastructure and shared with our data processors Microsoft and Amazon Web Services, it may be transferred and stored securely in the UK and European Economic Area. Where your personal data is stored outside the UK and EEA it will be subject to equivalent legal protection through the use of Model Contract Clauses

### **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](mailto: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 Energy Security & Net Zero (DESNZ)

You can contact the Data Protection Officer at:

DESNZ Data Protection Officer, Department for Energy Security & Net Zero 3-8 Whitehall Place, London, SW1A 2ED. Email: [dataprotection@energysecurity.gov.uk](mailto:dataprotection@energysecurity.gov.uk)

## Section 2 – About the Contracting Authority

### Department for Energy, Security and Net Zero (DESNZ)

The Department for Energy Security and Net Zero (DESNZ) is focused on the energy portfolio from the former Department for Business, Energy and Industrial Strategy (BEIS). Our focus is securing our long-term energy supply, bringing down bills and halving inflation.

#### **Our responsibilities**

- Delivering security of energy supply
- Ensuring properly functioning energy markets
- Encouraging greater energy efficiency
- Seizing the opportunities of net zero to lead the world in new green industries

## 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 (CA) Name and address	<b>Department for Energy, Security and Net Zero (DESNZ)</b> 3-8 Whitehall Place London SW1A 2EG
3.2	Buyer name	Jodene Pritchard
3.3	Buyer contact details	<a href="mailto:fmprocurement@uksbs.co.uk">fmprocurement@uksbs.co.uk</a>
3.4	Maximum value of the Opportunity	£750,000.00 Excluding VAT
3.5	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the eSourcing portal. Guidance on how to obtain support on using the eSourcing portal can be found in Section 7.25.</b> <b>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, unless formally advised to do so by UKSBS.</b>

Section 3 - Timescales		
3.6	Date of Issue of Mini Competition to all Bidders	Friday 28 <sup>th</sup> June 2024
3.7	Latest date / time Mini Competition clarification questions shall be received through the eSourcing Portal	Wednesday 10 <sup>th</sup> July 2024 11:00am
3.8	Latest date Mini Competition clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal	Friday 12 <sup>th</sup> July 2024
3.9	Latest date / time Mini Competition Bid shall be submitted through eSourcing Portal ( <b>the Deadline</b> )	Friday 19 <sup>th</sup> July 2024 11:00am
3.10	Anticipated selection and de selection of Bids notification date	Friday 26 <sup>th</sup> July 2024
3.11	Anticipated Award Date	Wednesday 31 <sup>st</sup> July 2024
3.12	Anticipated Contract Start Date	Thursday 1 <sup>st</sup> August 2024
3.13	Anticipated Contract End Date	Monday 31 <sup>st</sup> March 2025  Optional Extension Period: 3 Months up until 30th June 2025.

		The Department reserve the right not to instruct the extension period.
3.14	Bid Validity Period	90 Days
3.16	Framework and or Lot the Mini competition will be based on	BE23183 - Heat Network Zoning Programme – Framework Agreement - Sub-Lot 3.2 Model Management and Data Analytics
3.17	Anticipated Contracts Finder notice and redacted contract publication if applicable.	Within 30 Days of Award



## Section 4 – Specification

### **Introduction**

The Department for Energy Security and Net Zero (DESNZ) is appoint a Contractor to provide model management and data services for the National Zoning Model (NZM), which is being developed to support heat network zoning.

The NZM workstream to date has established a specification and work backlog for delivery of a Minimum Viable Product (MVP) by November 2024. The Centre for Sustainable Energy have delivered the software development component of the NZM to date and will remain in contract as ‘NZM developer’ to December 2024. This procurement is for a team with expertise in energy, software development and agile project delivery to facilitate delivery of the NZM workstream, with focus on the operationalisation, management, and data analysis activities until March 2025.

This period will focus initially on model testing and QA to enable MVP launch when the Heat Network Zoning Policy is live, other activities will include scoping the development for subsequent model versions and development of a transition to BAU plan. This will be completed working in collaboration with a multidisciplinary team within an existing broader programme and with various suppliers and stakeholder groups.

There are related requirements both within the NZM workstream and the broader programme, and the NZM team consists of both DESNZ staff and external consultancy support as detailed in section below.

### **Background to the Requirement**

#### **Heat Network Zoning Policy**

Decarbonising heat is an integral part of the government’s strategy and underpins the Net Zero Strategy, the Heat and Buildings Strategy and most recently, Powering Up Britain. This was affirmed in the Prime Minister’s speech on 20 September 2023 where he set out the government’s proportionate and pragmatic approach to net zero.

The Energy Act, which received Royal Assent in October 2023, establishes the regulatory framework for heat networks in Great Britain and grants the Secretary of State the powers to introduce heat network zoning in England through secondary legislation (“zoning regulations”). Our stated aim to introduce Zoning by no later than 2025, and therefore this tender specification is written based on adhering to that timeframe.

The regulations will enable the government to create two new zoning bodies: the heat network zoning authority – shortened to “the Central Authority” – and Zone Coordinators. The regulations will describe the rules these zoning bodies shall follow and their roles and responsibilities. The regulations will define how the zoning bodies will identify and designate heat network zones and specify any requirements about how decisions are to be made regarding what heat networks are built in a zone, where and by whom.

Act also includes powers to make regulations to set requirements that apply in zones. This includes:

- Which buildings can be required to connect to a heat network, and when and how such buildings may seek an exemption from this requirement.
- Which types of building in zones, such as new buildings, can be required to install communal heat networks.
- Requiring operators/owners of sources of heat to provide information, and/or to connect to a heat network.
- The rules around terms for supplying heat to a heat network, including prices.
- Introducing limits on greenhouse gas emissions from heat networks in zones.
- Specifying what data may be collected by the zoning bodies, and from whom, to support the identification and designation of heat network zones.
- Ongoing monitoring and reporting requirements.
- How the above requirements will be enforced and the appeals process.

The Department had undertaken two consultations on Heat Network Zoning, one in October 2021 and another ending in February 2024. We aim to publish our consultation response to the second consultation in Summer 2024. It is at this point that we expect the final policy positions to be known. Until this date, it is likely that some of the key requirements of the model functionality may evolve and/or change and therefore it's important that bidders understand that the National Zoning Model workstream will need to adapt to policy changes to ensure that the modelling remains consistent with the latest policy intent. Despite this we have a good understanding of the likely requirements that will be needed, the budget and the timeframes for delivery.

Alongside the development of the Heat Network Zoning Policy, BEIS trialled an initial approach to identifying zones as part of the City Decarbonisation Delivery Programme (CDDP). This adapted Centre for Sustainable Energy's THERMOS model to identify potential zones in six cities across England (Birmingham, Bristol, Greater Manchester, Leeds, Newcastle and Nottingham). Zoning was based on a data-driven viability assessment, with refinement from key strategic local stakeholders in each city. The previous tender sought to;

- Enable a standardised approach for setting heat network zones that is robust, transparent and minimises duplication of effort;
- Provide a consistent foundation for the use of national policy levers to support heat network development within designated zones;
- Reduce the burden on local actors by virtue of following a standard approach as opposed to designing a new approach each time; and
- Provide a common architecture which allows for the methodology to be updated as and when new assumptions, parameters, carbon targets or policies are introduced.

### **Heat Network Zoning Transition Programme**

The National Zoning Model is one of six interrelated workstreams that make up the Heat Network Zoning Transformation Programme (HNZTP). This programme aims to prepare

for the introduction of heat network zoning in 2025. The programme consists of several workstreams, described below:

**Legislation:** Establish the HN Zoning Policy; with defined statutory roles & responsibilities that enable subsequent delivery of HNZs at desired scale and pace

**National HNZ Modelling:** Develop a robust HNZ identification model, and establish DESNZ capability to continually assure, support and operate the model

**Digital:** Develop an online digital service to provide HNZ information to stakeholders including the visualisation of the HNZ identification model outputs

**Routes to Market:** Develop standards routes to market for the zone delivery procurement/appointment approach by Zone Co-ordinators

**Advanced Zoning Programme:** Undertake development work to support delivery of at least 10 zonal scale HNs in 2025 aligned with the HN Zoning Policy

**Central Authority/Zone Co-ordinator:** Explore the capability of establishing a Central Authority/Zone Co-ordinators (including functions, responsibilities, roles & step-in powers)

The scope of the model is England, as heat policy is devolved. In previous programmes of work, the model outputs have been socialised and tested with 28 towns and cities that formed part of the Heat Network Zoning Pilot Programme (HNZPP) and with the Heat Network Industry Council (Heat NIC). The HNZPP develop a process to identify and refine heat network zones across a range of towns and cities, to support the development of the policy. Zones were identified using a previous iteration of the model to support the identification of where heat networks provide the lowest cost, low carbon solution to decarbonise heat.

The NZM outputs also support the identification of zones within the Advanced Zoning Programme (AZP). The programme is working with 19 cities across England to accelerate the delivery of zonal-scale heat networks as part of the Government's ambition to supply 20% of heat through heat networks by 2050 to enable the UK to reach net zero. The cities that are part of AZP have been identified as those which are further developed around their planning and thinking of heat network development and are ready to deliver at pace and scale. AZP is supporting the development of best practice guidance, providing project development support services, and promoting market transformation ready for national heat network zoning policy.

Additionally, the outputs are being used to underpin other work within the Department such as the development of a potential Heat Networks Strategy and also inform an implementation strategy being developed by the Central Authority. DESNZ will manage the interactions between these programmes as part of this tender.

### **NZM & Lifecycle of a Heat Network Zones**

As set out in the second consultation, a heat network zone has several stages during which different bodies will carry out specific actions. The first stage of the zoning methodology is the identification of indicative heat network zones across England by the

Central Authority. This will be carried out using the National Zoning Model. Therefore, it is essential that the Department has a fully Quality Assured MVP National Zoning Model for the policy launch date as it is the first stage in the process.

The second part of the zoning methodology is the refinement of the indicative heat network zones. Both the Central Authority and the relevant Zone Coordinator will review the outputs of the model to check for accuracy. Where appropriate, they will collect additional data to ensure that the indicative zones have been identified using the most accurate information.

The NZM is a data-led spatial energy model developed by the Centre for Sustainable Energy for DESNZ to identify indicative heat network zones across England. The NZM provides granular outputs which, when supplemented with local data, will identify areas that may be taken forward for refinement and, subsequently, designation as heat network zones.

The department has developed the NZM as part of the Heat Networks Zoning Pilot Programme, utilising a specialist team with experience in heat networks, software development and energy modelling, along with input from local authorities and the department's Heat Networks Delivery Unit. The model uses a range of data sources, processing, and optimisation to identify potential zones as shown below:

These stages in the model are described in more detail below:

**Data led mapping:** the model uses a range of data sources to construct a data-rich map of individual building heat demand, potential pipe routes, and geographical features that may act as hard boundaries.

**Lowest cost, low-carbon options evaluated:** the model evaluates the low-carbon options for each building – a low-carbon heat network and an individual building air source heat pump – by combining the mapped data with a standard set of assumptions about technology costs and performance.

The model uses an iterative optimisation algorithm to find the lowest cost combination of Air Source Heat Pumps and heat networks in an area, which subsequently identifies a suggested heating solution for each building. The model repeats the optimisation process using a range of scenarios for the price of heat provided to the distribution network – the “heat price scenarios” – and generates a range of solutions for each building. In later stages, the model will match heat demand to available heat sources to identify the largest potential heat network based on the cost of heat.

We know that many stakeholders will be interested in the outputs of the NZM. The model, and its outputs, will therefore need to be clearly communicated to a range of stakeholders, including local government, building developers and owners, to support local refinement and designation. We will continue to refine the model and develop the underlying evidence to achieve this.

Zone shapes produced: The model discards areas that do not contain a network and combines adjoining areas in the same price scenario to create “zone shapes”.

**Candidate zones produced:** The model connects every zone shape to a heat source provided to the model if the cost of heat from the source is lower than the heat price scenario. This creates many instances which could become zones, called “candidate zones”.

Indicative zones selected: Candidate zones may overlap or compete for a single heat source. The model sorts all candidate zones by size and by economic potential. It selects the top configuration as the first indicative heat network zone and removes any other candidate zones which compete for a heat source or overlap spatially. This process continues for the next largest zone until all candidate zones have been selected or discarded.

### **Current Model**

The National Zoning Model has been primarily developed by the Centre for Sustainable Energy. The purpose of the model is to support the initial identification of heat network zones. The model is highly parameterised and flexible: what a zone is, and what properties a zone must have, depend on what values entered for parameters.

The NZM contains the following 8 main modules:

1. Dig categorisation model: assigns each road a classification for use in the optimiser
2. Heat demand model: prepares building-level demand data for the optimiser
3. Region mapping module: produces region polygons that can be joined to form larger shapes for the zoner
4. Clustering: partitions buildings into clusters by road network distance, to create computationally tractable optimisation problems.
5. Distribution network optimisation: use mixed-integer linear program (MILP) identify a minimised present cost of heating for all the buildings in a cluster
6. Zone shape production module: creates candidate zone shapes based on outputs of region mapping and optimisation
7. Zone cost model: evaluates zones financially, turning candidate zone shapes into candidate zones
8. Zone selection model: selects a non-competing set of zones from the candidate zones

### **Current Model Management , Data Analytics and Collection**

- The NZM is part-way through development, where the majority of key MVP features have been developed. Although there will be some components of development to complete, the core focus for the phase of delivery of this procurement will be Model QA. Management, Data, Collection and Development will largely centre around improving current model QA scores. This means working the internal Model QA analysts, External QA team and Developers to assess the NZM and supporting processes and documents, improve or develop where scores are not meeting expectation, and reiterate.
- The current delivery mode is working in 3-week sprints. This may change to accommodate for the QA focus, depending on the size of tasks and estimated completion times.

- The current delivery model tracks 2 separate sets of tasks – Jira is used to track business requirements, Github for development tasks in granular detail. This separation helps create clarity around responsibilities of tasks between the development team, data team and model management tasks not directly related to modelling. This may also change as the focus moves to QA if the separation no longer proves useful.

### **NZM team structure**

The NZM team consists of both DESNZ staff and external consultancy support. The Centre for Sustainable Energy have developed the NZM to date and will remain in contract as 'NZM developer' for the duration of this work.

The successful supplier would report into the DESNZ workstream lead and will be expected to collaborate with other suppliers supporting the workstream.

### **Scope and Requirement**

There are 4 main areas of focus under this lot 3.2, with specific in and out of scope expectations across each area as follows:

#### **1. Model Management & Project Management Office (PMO) Support**

<b>Products &amp; Services</b>	Delivery Management, Project Management, Technical Business Analysis. Provision of project management software – Atlassian JIRA. GitHub user accounts
<b>Estimated Resource</b>	~2FTE
<b>Exclusions</b>	Supplier expected to provide Jira software to manage project activity. Supplier not expected to provide GitHub project but will require accounts to access this for documentation and model development tasks.
<b>Constraints</b>	Resources across this may need to fluctuate depending on the need throughout the contract period. There may be times where more or less resources are required, in particular technical and general business analysis capabilities.

#### **2. Data Collection & Analytics**

<b>Products &amp; Services</b>	Energy modelling and data subject matter expertise
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<b>Estimated Resource</b>	~1-2FTE
<b>Exclusions</b>	Design or development of a database that contains wider heat network zoning data unrelated to the NZM data imports or exports
<b>Constraints</b>	Data may need to be migrated to alternative systems during this period as part of data management activity.
<b>3. Quality Assurance Support</b>	
<b>Products &amp; Services</b>	Test manager, SME in heat networks, energy modelling, data management, content writing / service design.
<b>Estimated Resource</b>	~1FTE
<b>Exclusions</b>	There are dedicated departmental resources for completed Quality assurance activities. This function is to support the development of the content required to pass the QA requirements but excludes managing or setting the QA requirements themselves.
<b>Constraints</b>	Co-dependency on the supplier for Quality Assuring the NZM
<b>4. Ad-hoc client support</b>	
<b>Products &amp; Services</b>	GIS analysis, data architecture, technical writing
<b>Estimated Resource</b>	~1 day a week
<b>Exclusions</b>	Data architecture, content and GIS analysis covered for this workstream only. There may be wider project demands on these capabilities outside of this workstream, which are not covered under this scope.
<b>Constraints</b>	Co-dependency on the supplier for Quality Assuring the NZM
See below for the specific requirements across each scope area.	

The period of this requirement covers August 2024 – March 2025 with an optional extension to 30<sup>th</sup> June 2025. The demand over this period is expected to be consistent with the above total FTE until Dec 24, with a reduced focus on data and test management Jan-Mar 25, noting that at times more or less of capabilities will be required.

To meet the aims of this procurement the supplier would need to deliver:

# 1. **Model management and project management support**

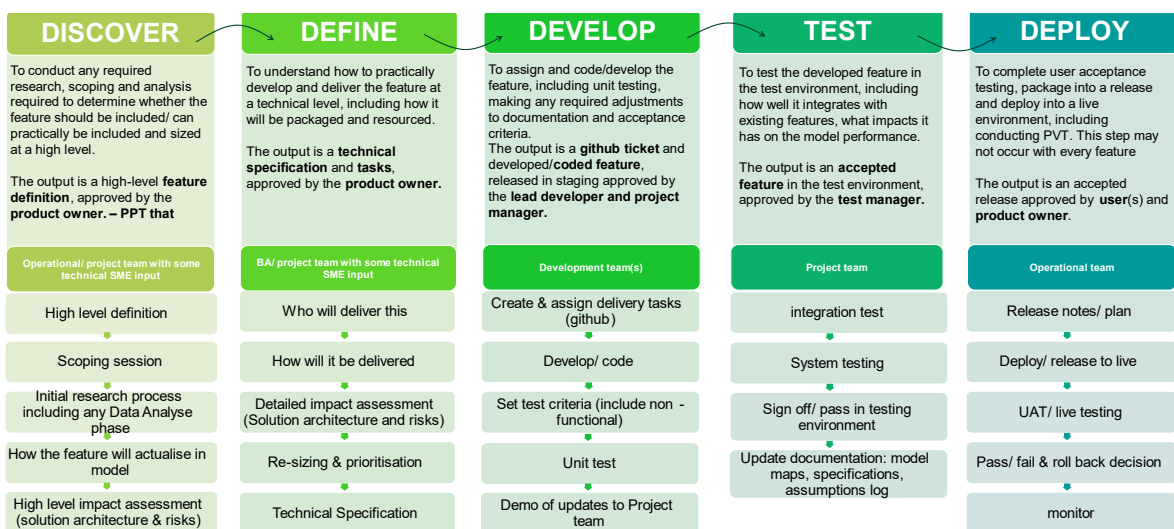
## Summary of key deliverables:

*A full suite of delivery and project management trackers maintained for developers & client:*

- *Developer Sprint Planning (GitHub)*
- *Business Requirement Planning (JIRA)*
- *Operational Gantt Chart*
- *Workstream Roadmap (Summary visual of Gantt Chart)*
- *RAID log (contribute to wider DESNZ RAID Log)*
- *A consolidated monthly report to DESNZ (1-2 slides)*
- *Co-ordination of regular within workstream meetings*
- *Attendance at relevant programme level meetings*
- *Delivery of suitable handover documentation at contract close, such that future suppliers could reasonably continue to provide similar services.*

## 1.1 Provide a **delivery management resource** to facilitate the delivery process for remaining MVP feature development:

This shall use an agile based approach with a bespoke process for moving features from a hypothesis through to development. The diagram below defines the process that has been used to deliver a feature. This process is then delivered through 3-week sprints, where each phase may happen in different sprints, depending on the size of the task.





The delivery manager will be expected to facilitate the sprint process, including running the following sessions across the 3-week period:

- regular weekly developer stand-ups (proposed 2 x 30min per week)
- sprint review meeting (proposed 1 x 1hr per sprint)
- backlog review meeting (proposed 1 x 1hr per sprint)
- sprint planning (proposed 1 x 1hr per sprint)

The sprint activities and backlog are managed in Atlassian Jira. The supplier is expected to provide this software and licences for relevant team members, including the DESNZ workstream lead, QA analysts and other suppliers on the workstream (up to a maximum of 20 licenced users). The supplier's delivery manager will be responsible for managing the Jira backlog activity and ensuring this stays up to date.

Outside of sprint activities, the delivery manager is expected to facilitate a weekly planning session (1hr) to align the non-development team each week and respond to any possible delivery or priority changes.

1.2 Provide **programme management services** by maintaining key documents such as regular risks, issues, dependencies and coordination efforts.

This includes providing updates to the DESNZ PMO on the workstream progress and status, key milestones, and updating the programme risk register, which shall be stored as an Excel Spreadsheet on the DESNZ SharePoint site. The supplier will be provided access to the relevant shared folders and documents upon appointment. The risk spreadsheet contains guidance on how to assess risks which must be followed by the supplier. This shall require attendance of 1 individual at relevant weekly meetings. Currently these are:

- NZM & central authority (future delivery body) dependency meeting (1hr/week)
- NZM & digital (web-platform) dependence meeting (1hr/every other week)
- HNZTP Co-ordination forward planning sessions (2hrs/month)
- NZM Risk sessions with DESNZ PMO (2 x 30min/month)
- Model management meeting (1hr/every other week)

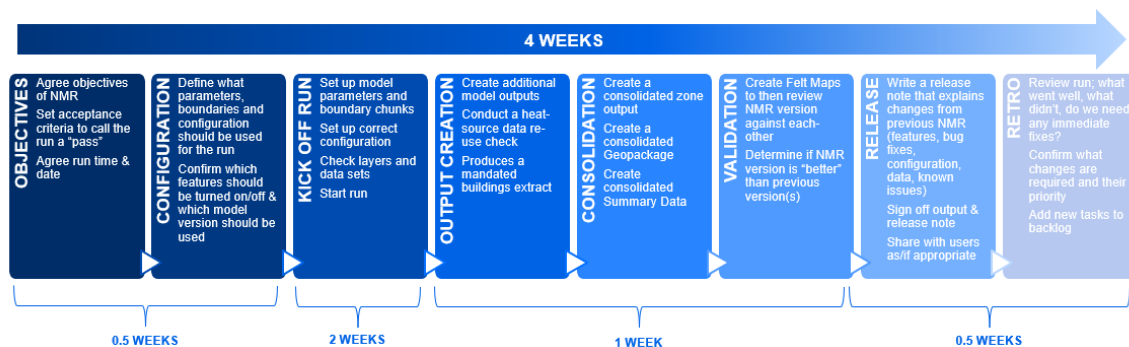
1.3 Provide **Business Analysis support** for feature and documentation development:

This includes leading and facilitating discovery sessions with key DESNZ or project stakeholders, recording business requirements and acceptance criteria on both Jira and GitHub tickets, holding definition workshops with the developers to write technical requirements and supporting testing. These sessions are held as required, but on average 3 hours a week are required. The business analyst shall provide guidance and agendas for each session and working with the delivery manager to find appropriate time slots with DESNZ stakeholders, the developers and other team members. Occasionally the creation of requirements will require specialist input, such as GIS, heat network developers, energy modellers or developers. The Business Analyst will work with the workstream lead and delivery manager to identify the relevant capabilities and in some sprints, resourcing will need to be flexible to accommodate the inclusion of such specialist input.

1.4 **Support the National Model Run process** as described in the diagram below:

## What happens when we do a National Model Run (NMR)?

Kicking off the model run is more than just pushing a button. There are several steps, checks and balances that need to happen to ensure we are producing the intended outcomes of the run. Considerations when doing a model run include: What is different from the previous run? What are we hoping to test/ prove? Who needs to use the outputs and for what purpose? Did the run meet the requirements? Did it have the correct parameters? Is it "better" than the previous version?



The supplier shall facilitate the steps of the model run, including coordinating sessions to define the outcomes of the national model run, organise the drafting of the release notes that must accompany the national model run, and drive progress through to completion for national model runs. This will require support from the developers, business analyst, workstream lead, data architect, and data analysts.

- 1.5 The supplier will work with DESNZ and the programme to develop a roadmap for post-MVP or Version 1 of the model. This requirement may change based on programme requirements, but could include further feature development, operating and support model development, and handover to BAU. It may also involve supporting or planning the requirements of a transition of the model from external servers and systems to DESNZ ones.
- 1.6 Provide project handover notes and documentation for a enable a potential future supplier to take over model management services. The handover notes and documentation should include the following information:
  - scope, objectives, and deliverables of the model management services
  - current status and progress of services
  - roles and responsibilities of the consultant and the client
  - tools, methods, and standards used
  - challenges, risks, and issues encountered and how they were resolved
  - lessons learned and best practices from this contract
  - recommendations and next steps for the future supplier

The handover notes and documentation should be clear, concise, and comprehensive, and should be delivered in a format that is easy to access and understand by the future supplier. The handover notes and documentation should be completed by March 2025

## 2. Support Data collection and analytics

### Summary of key deliverables:

- *A set of finalised existing data collection templates*
- *A suite of relevant high-quality data inputs (e.g. heat demand) for NZM ingestion*
- *Development of content to support quality assurance documentation & user guidance*

**2.1 Complete identified national data collection activities**, including defining methodologies, logging data assumptions and making recommendations for data ingestion to model.

The supplier will be provided with a list of datasets and current progress, as well as guidance around documentation, data management practices and collection approaches. The data collection aims to provide quality data at a national level to remove requirements for gathering at a local level and ensure as much consistency in methodology and accuracy of information as possible.

For collection, energy and heat network data analysts/subject matter experts may be required to contact external suppliers, data providers, or stakeholders. Data analysts are required to collect, document and work with developers on ingestion into the developer's repository of all national datasets identified.

They shall attend 1x 1hr session a week, presenting content, updates and any questions to the DESNZ workstream lead and other relevant parties. The supplier may choose to run additional internal sessions to plan work delivery.

Expected datasets to target include:

- Heating demand for Universities across England
- Heating demand for wet Leisure Centres owned by major operators across England
- Heating demand for key Government Property Agency buildings across England

Suppliers would be expected to evaluate available data then develop and deliver an appropriate methodology to transform the data into a format that can be used within the NZM, this would likely include activities such as:

- transformation of reported fuel consumption to heat demands
- mapping existing building data to standard OS identifiers
- delivery of dataset developed and testing of integration into NZM
- robust documentation of data transformation to DESNZ QA standards, suitably incorporated into NZM documentation (via Github repository)

**2.2 Ad-hoc energy data analytics** including facilitation of sector workshops to engage with key stakeholder groups to understand and update core data assumptions. This activity will be identified and scoped as part of the standard project sprint planning and delivery processes. It generally requires approximately 1 day a week of effort from an energy data SME/analyst. This is in support of improving data and assumptions within the NZM and the granularity of modelling.

Expected areas to provide support include:

- Review of heat network costs that could be differentiated in more detail – energy centres, pipe civils variation

2.3 Energy data modelling and analytics SME to support model feature development support in technical understanding and documentation clarifying key energy and modelling concepts in a general user-friendly format. This includes processing and updating model documentation, facilitating sessions with developers and key DESNZ stakeholders.

Expected areas to provide support include:

- Feature improvement – approach to peaking plant
- Feature improvement – approach to modelling peak electricity demand

Suppliers would be expected to provide expert technical input to ensure the NZM reflects typical heat network industry approaches to peaking, as well as complying with future policy requirements, this would likely include activities such as:

- Engaging with DESNZ leads, policy leads and industry stakeholders to understand expectations
- Conducting modelling to test requirements
- Communicating findings to the above stakeholders and to the NZM developer
- Support in acceptance testing of the developed feature

2.4 Data and solution architecture updates and supports in line with DESNZ guidance, project and programme requirements, and currently defined architectures. This includes analysis on data modelling, imports and exports that may need to change or be updated as model features are added.

2.5 Developing guidance documentation that supports users needing to provide data to the model as part of national or local data collection, working with subject matter experts and DESNZ stakeholders who have knowledge of the pilot and lessons learned. This is to include an outline of the model context, purpose of provision of local data that relates to existing buildings and heat sources, and clear direction as to the scope of data to include or exclude.

2.6 Ad-hoc GIS and visualisation support for analysing, testing or supporting modelling methodologies, users or outputs. Please note DESNZ, have limited current GIS capabilities, but this will improve over the year as 2-3x staff obtain access and relevant training, thus reducing the need for GIS support over the course of this contract.

### **3. Support NZM Quality Assurance**

3.1 Work with DESNZ analysts and QA team to develop and deliver a QA plan, resulting in successful QA clearance of the NZM in line with critical milestones, targeted at a 12-week period to close by w/c 4<sup>th</sup> November 2024.

3.2 Ensure that work is prioritised across the NZM workstream to ensure QA (separate contract – refer to specification provided as appendix C) is achieved by November 2024

- 3.3 Support the co-ordination of activity between the current software developer (CSE) and the future Quality Assurance (QA) supplier.
- 3.4 Draft content for user guidance of the NZM relating to plain-English non-technical summaries of what the NZM is, what it is trying to achieve, the scope, it's interactions with the wider policy (please note this will supplement user guidance of the core model code which will be led by the existing software developer)
- 3.5 Draft content for a business continuity plan to ensure the continuity of the NZM in the event of a business change, disruption, or disaster. This shall cover key risks, impacts, mitigations as well as the roles and responsibilities of the project team and stakeholders. It shall also define recovery objectives, timeframes, sources, procedures for testing, updating, and communicating the plan. The plan shall comply with relevant standards.
- 3.6 Draft content which outlines a validation and verification testing plan. This shall specify the testing strategy, scope, objectives, methods, schedule, resources, roles and responsibilities of those involved in the testing process. It shall summarise the key testing activities, results, outcomes, issues and recommendations for further development. The testing artefacts shall include test cases (or test code), test logs, and test reports.
- 3.7 Draft content which explains how sensitivity testing support delivery of high quality NZM outputs. This shall define the test cases and sensitivities or scenarios, describe the approach (e.g., simulation, modelling, analysis, experimentation), the scope of the test cases and scenarios and report outlining the results.
- 3.8 Support driving development QA teams and DESNZ to achieve passing score in QA outside of the technical QA scores.

#### **4. Provide Ad hoc client support**

- 4.1 The supplier will be required to provide ad hoc support for the modelling workstream where there may be gaps in capacity, up to a maximum time of 2 days a week. This support will include activity such as:
  - Sharing of outputs with users
  - gathering some user feedback to form next iteration of user processes and guidance.
  - Supporting the drafting of internal documents for internal DESNZ workshops
  - Business case support for the next phases of work.

#### **5. Communication, meetings and reporting**

- 5.1 Those working on the NZM are to be located across the UK, and regular meetings will be conducted over Microsoft Teams. There is an expectation to meet once every two or three months for an in-person team session, usually in either London or Bristol, at the supplier's expense.
- 5.2 Communication is expected to be conducted with the client predominantly via email and MS Teams calls. The NZM developer runs a GitHub ticketing system to track issues and plan sprints, it is likely that the successful supplier will communicate technical detail by this means.
- 5.3 In addition to meetings mentioned throughout the requirements, the following MS Teams calls are anticipated:
  - Kick-off with NZM team
  - Fortnightly teams call with DESNZ lead
  - Calls as required with the NZM developer

- Closedown call

### **Aims and Objectives**

The aim of this requirement is to support the delivery of an MVP NZM by end November 2024, with subsequent focus on scoping the development for further model versions and development of a transition to BAU plan.

The successful supplier will achieve this by managing delivery processes, supporting quality assurance activity and data collection and analytics.

The objective of this tender exercise is to procure support for department to continue to deliver the above aims with as little disruption to current operations as possible. This means as much as possible continuing to deliver services in line with the existing plan, scope, delivery methodology and team structures.

The supplier will need to meet some general expectations as part of this lot, including:

- Suppliers shall be flexible and adaptable to changes to DESNZ requirements – including resourcing types or capabilities as the needs of the workstream or project changes. These changes will be made in discussion and written agreement with DESNZ as they occur.
- Suppliers will need to work collaboratively across suppliers, DESNZ, key stakeholders both within the NZM workstream, wider project, and wider departmental ecosystem.
- Suppliers shall bring an understanding of heat networks, energy systems, project management methodologies, business analysis, energy modelling, technical or user-based writing.
- It would be advantageous for suppliers to have knowledge or experience in heat network zoning, Clojure, software testing and quality assurance processes
- To minimise disruption and impact on delivery timeframes, suppliers will be expected to adapt delivery approaches to work within the existing project structures, methodologies and dynamics as much as possible.

Further detail on specific outputs, expectations, requirements and deliverables are described in more detail in the sections below.

In order to meet the aims of this procurement, suppliers will need to achieve and deliver the following objectives:

1. Manage the delivery of the NZM MVP milestone by providing project management, business analysis, energy analysis, and documentation drafting support. This includes managing the QA, development and Data analytics teams to deliver to deadlines and requirements. It also includes supporting the programme and project PMO with their requirements from the workstream e.g. reporting, dependency meetings, supporting quality assurance preparation and activities.
2. National Data Collection, activities to continue development of bespoke datasets for use within the NZM, continued management of previously gathered datasets and associated data architecture in line with departmental practices.

3. Provide energy modelling analytical support for feature development, including synthesising model functionality into documentation.
4. Support QA activity to ensure that the NZM achieves QA clearance in line with the MVP deadline. This includes supporting the development of model documentation, user guides, processes and other artifacts that will help the model to achieve the required QA scores. Details of the departmental QA processes and tools are published at <https://www.gov.uk/government/publications/energy-security-and-net-zero-modelling-quality-assurance-ga-tools-and-guidance>

Provide the department with ad-hoc client support across the above activities, including but not limited to supporting business case development, drafting internal documentation to support decision-making, facilitation of workshops with key stakeholder groups, advice on technical digital solutions to support policy development.

### **Contract Term**

The demand over the period of the contract will be consistent with the above total FTE, noting that at times more or less of particular capabilities will be required. The period of agreement covers August 2024 – March 2025.

There will be an optional extension permitted for a period of 3 Months up until 30th June 2025. The Department reserve the right not to instruct the extension period and to conclude the contract at the end of March 2025.

Suppliers may be located across the UK, and regular meetings will be conducted over Microsoft Teams. There is an expectation to meet once a month for an in-person team session, usually in either London or Bristol, at the supplier's expense.

### **Data Security & GDPR**

The supplier is required to implement appropriate arrangements for data security at all times. Such procedures must meet the General Data Protection Regulation and the Data Protection Act 2018.

Any successful supplier shall uphold the Framework level requirements in relation to Data Security and adhere to any data processing in alignment with Annex 1 of Schedule 20.

Processes should be in place to safeguard against data loss, including appropriate risk management procedures. The Department reserves the right to vary the contract to ensure compliance with DPA 2018.

### **Social Value**

The successful supplier is expected to deliver social value under this contract in alignment with the social value commitments set at Framework Level under BE23183.

### **Indicative Timetable**

There are several HNZTP programmatic dependencies upon the NZM workstream, as such this work must be strictly delivered to timetable.

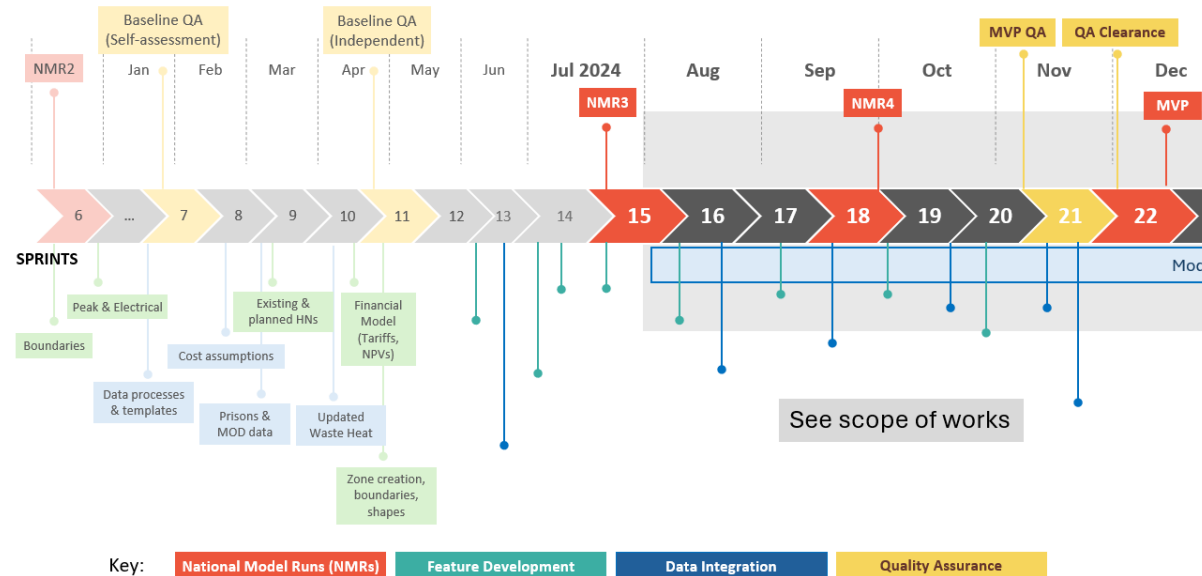
**Key milestones are:**

Supplier appointment and kick off – w/c 1<sup>st</sup> August 2024

NZM MVP Launch – 16<sup>th</sup> December 2024

Project handover documentation – March 2025

Model Management Services End – March 2025

**Staff Grade Descriptions and Pricing**

Bidders must complete AW5.2 Price Schedule and provide day rates/number of days for completion of the project outputs in line with the job roles defined at Framework Level attached in Appendix B.

Bidders are to ensure that the day rates for each Staff Grade Description do not exceed the maximum rate defined at Framework Level. If a day rate in your submission exceeds the maximum framework rates this will result in your bid submission being deemed non-compliant and will not be considered.

By submitting a response, bidders confirm that the prices offered will remain open for acceptance for a minimum of 90 Working Days from the date of submission.

**Technical Scoring**

Any bidder which achieves a score of 60 or less in any of the following technical questions will not be considered for appointment:

- PROJ1.1 – Approach and Methodology
- PROJ1.2 – Staff to Deliver
- PROJ1.3 – Project Plan and Timescales.



**Invoicing and Payment**

The supplier shall submit their invoice monthly for the service ensuring that a breakdown is provided. The Department aims to pay all correctly submitted invoices as soon as possible with a target of 10 days from the date of receipt and within 30 days at the latest, in line with the standard terms and conditions.

**Appendix C – BE24142 Specification**

Please refer to the attached appendix C to provide additional insight into the codebase review activities within QA that will be delivered by a third-party supplier with expertise in Clojure.

**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 of Bids

The evaluation model below shall be used for this Mini Competition, which will be determined to four decimal places.

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

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

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

Do not exceed the page limits specified within each of the Non Commercial criteria, any additional content provided beyond the specified page limit will not be considered or scored during the evaluation process. Where bidders include a cover page and/or annex, this will be taken into consideration within the page limit and therefore this is discouraged.

Where a Non Commercial criteria requires an additional attachment such as an organogram or risk register bidders are to note the eSourcing Portal only permits 1 document upload per question therefore bidders must attach their response as a Zip folder.

Pass / Fail Criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information Exemptions
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW4.1	Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW4.3	PPN01/22 Contracts with suppliers from Russia or Belarus
Qualification	SEL5.2.2	Supply chain payment
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable bids
-	-	Mini Competition response received on time within the eSourcing Portal
	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 Mini Competition. The Contracting Authority considers these weightings to be in line with the framework.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Technical	PROJ1.1	Approach and Methodology	100.00%	50.00%
Technical	PROJ1.2	Staff to Deliver		25.00%
Technical	PROJ1.3	Project Plan and Timescales		25.00%

## Evaluation of Criteria

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 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. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

### **Example**

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

Any bidder which achieves a score of 60 or less in any of the following technical questions will not be considered for appointment:

- PROJ1.1
- PROJ1.2
- PROJ1.3

### **Final Evaluation Scoring Method**

The final evaluation shall be determined by a Price Per Quality Point (PQP) mechanism, based on the method outlined in Appendix II of the Government Commercial Function's Bid Evaluation Guidance Note<sup>1</sup>.

The PQP shall be calculated to four decimal places (applying standard rounding rules). Preferred bidder status will be awarded to the bid with the highest total quality score with a PQP score that is a maximum of 10% higher than the complaint bid with the lowest PQP score.

The PQP will be calculated by:

1. Taking the Quality Score, which is the sum of the weighted technical scores for each Technical question asked.
2. Dividing the price submitted the Quality Score, to give a PQP score for each bid response.
3. Preferred bidder status will be awarded to the bid with the highest total quality score with a PQP score that is a maximum of 10% higher than the compliant bid with the lowest PQP score.

<sup>1</sup>

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/987130/Bid\\_evaluation\\_guidance\\_note\\_May\\_2021.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/987130/Bid_evaluation_guidance_note_May_2021.pdf)

The table below is a worked example of this process. Please note the figures within the table are provided for illustrative purposes only.

Tenderer	Total Quality score of technical proposal	Price submitted	PQP Score calculation	Within PQP Range?	Winner
A	50	£205,000	$(205,000 / 50) = 4,100$	Y	
B	60	£240,000	$(240,000 / 60) = 4,000$	Y	
C	70	£301,000	$(301,000 / 70) = 4,300$	Y	*
D	75	£337,500	$(337,500 / 75) = 4,500$	N	

Should the evaluation result in a tie, the technical questions will be ranked according to the highest weighting assigned to those questions and where questions have the same weighted score, the order of question number will take precedence. Then the tied Bidders will move down this question list until that point it is identified where a Bidders scores higher than (an)others, at which point they will be selected for Preferred Bidder status.

In the unlikely event that scores remain tied after following the above process, the Contracting Authority will call those remaining tied Bidders for a presentation, details of this and the scoring method to be used will be shared prior to the presentation.

## Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> <li>Mini Competition (MC) bid logged upon opening in alignment with UKSBS's procurement procedures.</li> <li>Any MC response received after the closing date will be rejected unless circumstances attributed to UKSBS, the Contracting Authority or the eSourcing Portal beyond the bidder control are responsible for late submission.</li> </ul>
Compliance check	<ul style="list-style-type: none"> <li>Check all Mandatory requirements are acceptable to the Contracting Authority.</li> <li>Unacceptable responses maybe subject to clarification by the Contracting Authority or rejection of the Bid.</li> </ul>
Scoring of the Bid	<ul style="list-style-type: none"> <li>Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.</li> <li>The bid may be subject to moderation as advised in the criteria section, prior to any award decision.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>The Evaluation team may require written clarification to Bids</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.</li> </ul>
Due diligence of the Bid	<ul style="list-style-type: none"> <li>the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> <li>Submission of insurance documents from the Bidder.</li> <li>Request for evidence of documents / accreditations referenced in the / MC / Bid and / or Clarifications from the Bidder.</li> <li>Taking up of Bidder references from the Bidders Customers.</li> <li>Financial Credit check for the Bidder.</li> </ul> </li> </ul>
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> <li>To review the outcomes of the Due Diligence.</li> <li>To agree final scoring for each Bid, relative rankings of the Bids</li> <li>To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the unsuccessful Bidders response.</li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>To confirm contents of the letters to enable feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.</li> </ul>

## **Section 6 – Evaluation Response Questionnaire**

Bidders should note that the evaluation response questionnaire is located within the **eSourcing Portal**.

**Guidance on how to register and use the eSourcing portal is available at**

**<https://beisgroup.ukp.app.jaggaer.com/>**

**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 Section 3 of the Mini Competition 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 the eSourcing portal 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 eSourcing Portal messaging system to raise any clarifications to our Mini Competition. 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 and concise and ideally generic contact details; telephone numbers, e-mail details.
- 7.10 Do complete all questions in the evaluation response 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 UKSBS 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 UKSBS staff or the Contracting Authority 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 UKSBS 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 page limits, the additional pages 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, unless the Framework explicitly permits this.
- 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 the eSourcing Portal. 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 eSourcing portal and problems with functionality within the portal must be submitted to the eSourcing Helpdesk

**Phone** 08000 698 632

**Email** [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com)

Please note; the eSourcing Portal is a free self-registration portal. Bidders can complete the online registration at the following link:

<https://beisgroup.ukp.app.jaggaer.com/>

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. 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 Response 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 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 Mini Competition Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 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 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 Call Off 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 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 Mini Competition consent to these terms as part of the competition process.

- 7.43 The Government revised its Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 to replace the previous 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 Mini Competition to reflect any changes introduced by the GSC. In particular where this Mini Competition 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](#)

## 8.0 Freedom of information

- 8.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UKSBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UKSBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including Mini Competition templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UKSBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this Mini Competition, Bidders are agreeing that their participation and contents of their Response may be made public.

## **9.0. Timescales**

- 9.1 [Section 3](#) of the Mini Competition sets out the proposed procurement timetable. The Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

## **10.0. The Contracting Authority's Contact Details**

- 10.1 Unless stated otherwise in these Instructions or in writing from UKSBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this procurement must be directed through the eSourcing tool to the designated UKSBS contact.
- 10.2 Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Response outside of the eSourcing portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all bidders as to how to submit your Response Failure to follow this requirement will result in disqualification of the Response.

## Appendix A – Glossary of Terms

TERM	MEANING
<b>“UKSBS”</b>	means UK Shared Business Services Ltd herein after referred to as UKSBS.
<b>“Bid”, “Response”, “Submitted Bid”, or “MC” Response”</b>	means the Bidders formal offer in response to this Mini Competition
<b>“Bidder(s)”</b>	means the organisations being invited to respond to this Mini Competition.
<b>“Central Purchasing Body”</b>	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
<b>“Conditions of Bid”</b>	means the terms and conditions set out in this MC relating to the submission of a Bid
<b>“Contract”</b>	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
<b>“Contracting Authority”</b>	means a defined term in the Public Contracts Regulations 2015, a public body subject to the procurement Regulations.
<b>“Contracting Bodies”</b>	means the Contracting Authority and any other contracting authorities described in the procurement documentation provided.
<b>“Customer”</b>	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
<b>“Contracts Finder”</b>	The government portal for advertising publically funded procurement awards as a result of a MC if above the required thresholds <a href="https://www.gov.uk/contracts-finder">https://www.gov.uk/contracts-finder</a>
<b>“Due Diligence Information”</b>	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this MC.
<b>“EIR”</b>	mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
<b>“FoIA”</b>	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
<b>“Mandatory”</b>	means any pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
<b>“Mini Competition” or MC”</b>	Means a competitive procedure of more than one bidder equally competing to secure an award of the opportunity as well as all related documents published by UKSBS and made available to Bidders and includes the Due Diligence Information.
<b>“Named Procurement person”</b>	means the single point of contact for the Contracting Authority based in UKSBS that will be dealing with the procurement
<b>“Order”</b>	means an order for served by any Contracting Body on the Supplier
<b>“Supplier”</b>	means the organisation awarded the Contract
<b>“Supplies /Services / Works”</b>	means any supplies/services and supplies or works set out at within <a href="#">Section 4 Specification</a>