

# Request for Proposal



**Request for Proposal (RFP) on behalf of the Climate Change Committee**

**Subject: Projections of Climate Risks, Their Societal Impact and Cost, And the Cost and Effectiveness of Adaptation Measures for Heat in The Urban Built Environment**

**Sourcing Reference Number: BE24084**

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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 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 our customers 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 the Department for Business, Energy & Industrial Strategy (BEIS), UKSBS' 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.

### Our Customers

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

UKSBS 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 (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>

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 Climate Change Committee.

You can contact the Climate Change Committee Data Protection Officer at:

Climate Change Committee Data Protection Officer  
1 Victoria Street,  
London  
SW1H 0ET.  
Email: [Finance@theccc.org.uk](mailto:Finance@theccc.org.uk)

## Section 2 – About the Contracting Authority

### Climate Change Committee

The Climate Change Committee (CCC) is an independent, statutory body established under the Climate Change Act 2008. Our purpose is to advise the UK and devolved governments on emissions targets and to report to Parliament on progress made in reducing greenhouse gas emissions and preparing for and adapting to the impacts of climate change.

### Governance

- [Corporate Business Plan 2023 – 2026](#) – This document sets out the CCC’s strategic objectives, priorities and work programme.
- [Framework Document](#) – This document describes the broad framework within which the organisation operates and covers the role of both the CCC and Adaptation Committee (AC), their governance and accountability, management and financial responsibilities.
- [Diversity and Inclusion](#) – The strategy aims to build a positive, constructive equality, diversity and inclusion (EDI) culture within the CCC and to ensure that EDI informs delivery of our statutory obligations.
- **Audit and Risk Committee** – This Committee supports the CCC and the Chief Executive (as Accounting Officer) in their respective responsibilities for control and governance, risk management and associated assurance.
- **The Secretariat** – The Secretariat provides analytical and corporate support to the Committee and is made up of around 45 staff members, led by the Chief Executive.

## Section 3 – Working with the Contracting Authority

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	Climate Change Committee 1 Victoria Street London SW1H 0ET
3.2.	Buyer	Ben Osborne
3.3.	Buyer contact details	<a href="mailto:fmprocurement@uksbs.co.uk">fmprocurement@uksbs.co.uk</a>
3.4.	Maximum value of the Opportunity	£300,000.00 excluding VAT
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.1.11.</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 posting of Contract advert to Find a Tender and Contracts Finder	Tuesday 09 <sup>th</sup> April 2024
3.7.	Latest date / time RFP clarification questions shall be received through the Jaggaer eSourcing Portal	Monday 29 <sup>th</sup> April 2024 14:00
3.8.	Latest date RFP clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Friday 3 <sup>rd</sup> May 2024
3.9.	Latest date and time for Bidder to request access to the RFP documents	Wednesday 15 <sup>th</sup> May 2024 13:00
3.10.	Latest date and time RFP Bid shall be submitted through the Jaggaer eSourcing Portal ( <b>the Deadline</b> )	Wednesday 15 <sup>th</sup> May 2024 14:00
3.11.	Anticipated notification of proposed Contract award to unsuccessful bidders	Thursday 30 <sup>th</sup> May 2024
3.12.	Anticipated Contract Award Date	Thursday 13 <sup>th</sup> June 2024
3.13.	Commencement of Contract	Monday 17 <sup>th</sup> June 2024
3.14.	Completion of Contract	Monday 16 <sup>th</sup> June 2025
3.15.	Bid Validity Period	90 Days

## Section 4 – Specification and about this Procurement

### **Introduction to the Climate Change Committee**

The Climate Change Committee (CCC) is an independent, statutory body established under the 2008 Climate Change Act and is tasked with:

- Providing independent advice to the Government on risks and opportunities to the UK from climate change, in part through the UK Climate Change Risk Assessment, and reporting to Parliament on progress in adapting to climate change.
- Providing independent advice to Government on setting and meeting carbon budgets in line with the UK's longer-term target to reduce greenhouse gas (GHG) emissions to net zero by 2050, and reporting to Parliament on the progress made.

To do this, we conduct independent analysis into climate change science, economics and policy, and engage with a wide range of organisations and individuals to share evidence and analysis. Our past reports are available from <http://www.theccc.org.uk/publications/>.

### **Background**

The UK Climate Change Act 2008 requires the UK government to publish a Climate Change Risk assessment (CCRA) every five years. The CCRA seeks to provide the most authoritative and up-to-date assessment of the risks and opportunities facing the UK from climate change and the adaptation actions that need to be put in place across society to ensure that the UK is well-placed to manage these risks. UK Government, and each of the 3 devolved administrations, must then create National Adaptation Programmes with plans for actions that address the risks in the most recent risk assessment. The Fourth UK Climate Change Risk Assessment (CCRA4) Government Report is due to be published in January 2027. As with CCRA2 and CCRA3 it will be based on an Independent Assessment that the CCC has been commissioned by DEFRA to lead; this will be published in mid-2026.

As part of CCRA4, we will be developing a new output to complement the Technical Report as produced in previous CCRA's. This output – to be known as the 'Well-adapted UK report' (WA report) – will focus on the potential for key adaptation actions to reduce the climate risks threatening the achievement of key UK policy and societal outcomes and hence set out a vision for aspects of a well-adapted UK. The WA report aims to provide a policy-relevant evidence base on effective systemic adaptation scenarios, their costs and benefits (and how these are distributed across society) and the investment needs to deliver on them.

The report will be tailored to best inform the development of effective actions in the next set of national adaptation programmes from Governments across the UK and will be targeted towards an audience of senior decision-makers in government. It also seeks to provide a more spatial and quantitative representation of UK climate risks and adaptation, an improved understanding of the potential for cascading climate risks, and their interactions with other key policy priorities such as delivering Net Zero.



This WA report will be informed by a set of commissioned, bespoke, analysis projects, in-house CCC analysis and wider external evidence. The purpose of this specification is to commission one of the bespoke analysis projects that will deliver part of the evidence required for the WA report to deliver on the aims outlined above, including quantification of a cost-optimal level of resilience. The analysis will need to be developed collaboratively with decision makers and consider both risk and adaptation interventions as systemically as possible, while focusing on delivering social and economic analysis and evidence at appropriate spatial scales.

This project seeks to understand the scale and costs of present day and future impacts of extreme heat on health and productivity in urban areas in the UK. People who live and work in urban areas are likely to be more exposed to high temperatures due to urban heat island (UHI) effects which result from factors including urban form, heat-absorbing materials and human activity generated heat.

Such increased exposure to high temperatures results in more impacts to population health, productivity and the built environment. Heat is further amplified in urban areas, for example UHI has been estimated to contribute just under 50% of heat related mortality for inner London (Milojevic et al., 2011). In addition to health impacts, heat can impact the ability of people to work and contribute to structural damage of buildings and infrastructure.

There are a variety of adaptation actions which can mitigate heat in urban areas by, for example, minimising heat absorption and promoting shading and evaporative cooling (Macintyre and Heaviside, 2019). There is limited existing evidence on the extent to which such actions may mitigate the extent of urban heat risks at a national scale.

In this project, we would like suppliers to estimate the costs and benefits of delivering adaptation actions in the built environment (at the street-scale and building-scales) to reduce the impacts of present-day and future heat risk in urban areas in the UK.

The project seeks to understand the (i) scale and costs of current and future urban heat impacts to the built environment (especially in terms of health and productivity) and (ii) the most cost-effective physical adaptation interventions for new and existing urban developments to reduce these impacts.

#### References:

*Milojevic A, Wilkinson P, Armstrong B, Davis M, Mavrogianni A, Bohnenstengel S, Belcher, S. (2011) Impact of London's Urban Heat Island on Heat-related Mortality. Epidemiology. 22(1):S182-S183.*

*Macintyre H.L., and Heaviside C, (2019) Potential benefits of cool roofs in reducing heat-related mortality during heatwaves in a European city. Environ. Int., 127 (2019), pp. 430-441*

#### **Project Scope**

This project involves a number of distinct tasks across 3 key phases. The percentage in brackets for each phase indicates the approximate expected resource split between

phases and hence the weighting that will be given to the methodology score (PROJ1.1) for each phase during the bid assessment.

### **Phase 1: Project inception (15%)**

Tasks to be completed in this phase are:

- Work with the CCC to establish and manage a project stakeholder steering group.
- Undertake a review of the existing work in this space, including the costs to health and productivity of climate impacts from heat hazards in the urban built environment and possible adaptation actions and their investment requirements.
- Undertake a review of existing modelling approaches, findings and model output data for assessing urban heat at the city or street-level and building-level scale.

### **Phase 2: Modelling and analysis (75%)**

A detailed methodology for the preferred approach to phase 2 is provided in a separate methodology document. The methodology consists of 4 main tasks with further sub-tasks listed in the methodology document provided in Appendix B:

- **Task 2.1:** Estimate present-day and 'baseline' future risk.
- **Task 2.2:** Identify and appraise adaptation options.
- **Task 2.3:** Build a scenario of cost-optimal adaptation.
- **Task 2.4:** Conduct sensitivity analyses.

### **Phase 3: Reporting (10%)**

- Handover of models and datasets (as appropriate).
- Reporting and presentation of results.

Bids should outline a proposed methodology for each phase, noting any limitations in modelling capabilities or scope. Further details of the tasks are provided below.

### **Phase 1: Project Inception**

#### **Task 1.1: Establish and manage a stakeholder steering group**

The first task is to convene a stakeholder steering group for this project. The steering group aims to ensure that the work remains useful and useable to the intended policy audience, as well as being grounded in the best available evidence and methods. The steering group should be consulted at key intervals throughout the project to provide the necessary scrutiny of and input into the analysis with the successful bidder providing the secretariat function, including meeting minutes.

Working level representatives of organisations from across the UK (including representation from Scotland, Wales and Northern Ireland) with responsibilities for decision-making relevant to the analysis should be included, and the group could also include relevant technical experts. The group should be multi-disciplinary and reflect the range of risks,

impacts and adaptation actions relevant to the project. To ensure the group is effective and manageable, membership should be limited to a maximum of 15 participants.

The CCC will be able to recommend contacts from across UK Government and other public agencies who could usefully serve on the group as representatives of the policy audience. These are likely to include organisations such as central and local government planning and building departments, CIBSE, developers, health agencies and academics (e.g. urban modelling or urban heat experts). Bids should outline any other organisations, or individuals, who might usefully serve on this group as key stakeholders in the decision-making space relevant to the analysis. Final membership of this group should be agreed with the CCC before its first meeting.

Bids should propose a timetable for stakeholder steering group meetings across the lifetime of the project. A proposal for how the stakeholder steering group will be run to meet the needs of the tasks below should also be included. The first meeting of this stakeholder group should occur soon after the project kick off meeting to introduce stakeholders to the project and solicit any initial input on finalising the project scope.

This project must align with the heat-healthcare system impacts deep-dive BE24035 (e.g. by using the same metrics). To ensure that outputs from two research projects complement one another, suppliers must meet with the CCC and the suppliers involved in the heat-healthcare project at an early stage. Further meetings and collaboration, including with the stakeholder groups, may also be required.

**Task 1.2: Undertake a review of the existing work in this space, including the costs of climate impacts from heat in the urban built environment and possible adaptation actions and their investment requirements.**

A rapid review of existing evidence including academic and grey literature, to help inform any refinements to the proposed modelling approach in the bid document. This review should be written up to form part of the final report on this project.

The review should build on and not duplicate previous work done by the CCC in scoping this project and in the CCRA4 inception projects published [here](#). In particular, the review should aim to evidence the following:

- Existing work that this project may be able to build on or complement.
- Relevant existing data sources or modelling approaches, especially for UK urban case studies. We are particularly interested in data sources or models which provide evidence for estimates of the costs of climate (urban heat) impacts that may occur today or in future. For this project, we anticipate that suppliers will need to carry out an in-depth literature review on the existing datasets and modelling approaches. We are keen that this project makes use of existing models and model outputs. This includes using values from existing literature for aspects of analysis (e.g. temperature-mortality factors).
- A longlist of potential adaptation actions that might be modelled in Phase 2 and data sources on their efficacy, costs and benefits (both monetary and in broader terms and including ancillary costs and benefits where possible). We suggest that suppliers present an approach for summarising existing evidence on the efficacy,

and costs and benefits of different adaptation actions, particularly under future climate scenarios. Suppliers should consider international evidence and examples in this review. Suppliers should also consider the trade-offs and synergies with delivering these actions alongside climate mitigation actions.

- Review of existing capacity limits in adapting to heat in buildings and urban developments. It may be useful for bidders to engage with stakeholders such as building managers or review case studies of impacts on the public from heat in the UK (such as during July 2022) or adaptation delivery.
- Existing resilience standards used in the area of interest and/or metrics commonly used to measure resilience.

Bidders should set out the details of how they intend to approach this review in their bid and how they would ensure it is done in a time-efficient manner whilst also ensuring that key evidence sources are thoroughly identified.

At the end of phase 1, any changes to project scope or approach as a result of evidence identified during stakeholder engagement or the evidence review must be agreed with the CCC and be delivered within the originally agreed budget.

## **Phase 2: Modelling and Analysis**

The main phase in this specification is the production of the modelling and analysis required to produce bespoke evidence for CCRA4's Well Adapted UK report. A detailed methodology for the preferred approach to phase 2 is provided in a separate methodology document (Appendix B). This methodology has been developed to encourage a consistent approach across all the bespoke analysis projects that the CCC will be commissioning to feed into the Well Adapted UK report. Where feasible, we would expect suppliers to follow the approach to Phase 2 outlined in the methodology document as closely as possible. For individual research projects, the approach set out may not be appropriate due to model or data limitations. In some cases, this has been identified in the following specification with an alternative approach suggested. We also welcome suggestions for alternative approaches from suppliers where these are necessary. Any alternative assumptions used in the proposed method should be transparently described and justified.

This methodology document outlines the preferred approach to the following tasks:

- **Task 2.1:** Estimate present-day and 'baseline' future risk
- **Task 2.2:** Identify and appraise adaptation options
- **Task 2.3:** Build a scenario of cost-optimal adaptation
- **Task 2.4:** Conduct sensitivity analysis

Bids should clearly specify the extent to which existing models and datasets can be used or adapted for the analysis and where new models or datasets will need to be developed.

This project should use this methodology to assess the costs of present-day and future impacts of high temperatures in urban areas. There are impacts of extreme temperatures which are out of scope for this project. The project scope is outlined below for the tasks. Bidders should indicate any areas of the essential part of the scope that will not be feasible under their proposed methodology, where they are able to deliver optional aspects of the

scope and any additions to the scope that might be possible. The finalised scope and selection of essential and optional parameters will be agreed at the project kick-off meeting.

- **Climate hazards**

Analysis should focus on high temperature as the climate hazard. Our preferred data source for temperatures would be Met Office local and regional weather data. We would like this project to focus mainly on heat risks and impacts in urban areas in the UK.

High temperatures should be characterised by appropriate metrics, such as maximum daytime and overnight summer air temperatures. This project should consider outdoor and indoor temperatures in a range of urban settings and indoor spaces (e.g. homes, hospitals, schools, prisons, offices, factories, streets). Bidders may wish to propose a suite of metrics (e.g. number of annual degree days over 28°C, relative humidity). Bids should set out proposed metrics and their rationale. However, the final metrics will need to be agreed with CCC across this project and the heat-health deep dive.

Future temperatures should be characterised by UKCP18 Local and/or Regional projections. Where possible, heat hazards should be able to be described by a % probability per year (e.g. 1% annual chance of maximum overnight temperatures of 28°C) for consistency (i.e. rather than using return periods or other approaches).

Desired scenarios for how hazards should be projected to evolve into the future, and desired time periods for analysis, are outlined in annexes 2 and 3 of the methodology document (Appendix B). Bidders should outline their ability to utilise climate projections aligned with this framing.

- **Exposure**

Analysis should consider how exposure to urban heat impacts may change under future urban development scenarios as well as future climate hazards. We would therefore expect urban development scenarios to be generated for each proposed baseline pathway and used in the sensitivity analyses. Urban development modelling should be driven by the socioeconomic projections specified in annex 4 of the methodology document (Appendix B) and agreed assumptions about current development or planning policies. Suppliers should set out how urban development modelling may be used to account for adaptation outside of the baseline pathways (i.e. through changes to planning assumptions under different adaptation packages). Comparable urban development scenarios should also be used in the sensitivity analyses (Task 2.4A). Urban development scenarios should be agreed by CCC and the stakeholder group.

- **Measuring risk and impacts**

High temperatures are likely to cause a range of adverse impacts on people and infrastructure in urban areas in the UK. This project will not be able to consider all of these potential impacts. The CCC would like bidders to focus on the impacts to (i) population health and (ii) productivity from excess heat as a priority. The impacts of reduced cold may be considered but are not essential requirements. We suggest that impacts are characterised as follows but are open to discuss

metrics proposed by bidders. However, it is essential for the health impact metrics to be aligned with those used in the health impacts deep dive project. There will therefore be a process of triangulation and agreement across the two project partners, with CCC making the decision on the final metrics to be used.

- **Health:** mortality and morbidity. Expressed in a metric such as excess mortality, quality-adjust life years or disability-adjusted life years. Additional metrics, which can be costed, such as heat-related hospital admissions are optional.
- **Economic productivity and costs:** cost of heat-related disruption to productivity. Expressed in a metric such as annual productivity lost per m<sup>2</sup>, annual costs of running air conditioning per m<sup>2</sup>.
- An optional impact metric should consider physical damage to the built environment from high temperatures, such as annual maintenance costs due to heat damage to concrete buildings.

Suppliers should set out potential data sources for the above metrics. Examples could include UKHSA data, building stock models and ONS data. Suppliers should also identify specific data gaps that inhibit a full assessment across the UK. We acknowledge that these metrics represent a narrow range of the potential impacts of high temperatures in the UK's built environment. The project's scope does not cover wider systemic risks, such as disruption to transport infrastructure, physical damage to buildings and infrastructure and impacts on recreational activities. We welcome suggestions from bidders to include wider impacts, should they believe these to have significant value-add and be realistically achieved in the project scope, budget and timelines. Bidders may also wish to indicate where future studies could easily build on this project.

The analysis should include an assessment of vulnerability (see 'Distribution of impacts' below) as a key input into the risk assessment. Desired future socioeconomic scenarios under which the risk impacts will evolve are specified in annex 4 of the methodology document. Bidders should outline their ability to utilise this approach as part of their bids.

- **Distribution of impacts**

All CCRA4 projects are encouraged to consider distributional analysis. This could include consideration of different vulnerability to risk and impacts of different groups as well as possible distributional effects of the proposed adaptation actions. Distributional analysis is required in this project and should focus on urban areas in the UK. It should aim to highlight which urban regions, which parts of these urban regions and what type of buildings within these regions might be more exposed to the heat risks. Analysis should then consider the areas and buildings where vulnerability may be higher. This should include an assessment of the distribution of the health impacts by household and population characteristics, particularly age and deprivation. Bidders should set out their suggestions and methods for including this analysis in the project, which can be agreed with the CCC on project kick off.

As a public body, the CCC is required to comply with the Public Sector Equality Duty (PSED) by considering how its analysis and advice can affect those with characteristics that are protected under the Equality Act. While delivering this project, the successful bidder must consider where the risks or adaptation actions under assessment could disproportionately affect those with [protected characteristics](#). Bidders should be aware of these requirements and the potential for scope adjustments as consideration of the PSED is developed. The CCC is separately commissioning updates to key cross-sectoral vulnerability metrics (see annex 5 of the methodology document – Appendix B)) that can be shared with the successful bidder when available (expected summer 2024) for use in this analysis where relevant, but existing sources of data for distributional analysis should also be considered by potential bidders.

- **Adaptation actions**

Adaptation actions to be evaluated in this project will be agreed with the CCC following stakeholder consultation (including with the project stakeholder steering group), evidence review and expert judgement. Bidders should consider actions used in international urban areas which are already experiencing heat risks in the range of UK future projections. This project should focus foremost on actions in the physical built environment. We anticipate that these will include:

We anticipate that these will include:

- **Planning-scale interventions.** These should include green infrastructure, materials and design of surfaces (e.g. white pavements) and large-scale shading. Additional built interventions could include creating and running cooling centres and public water fountains.
- **Building-scale interventions.** These should include passive cooling measures, such as shutters and ventilation, and active cooling measures. Building types, such as homes, offices, schools and hospitals should be considered, although we acknowledge that not all types of buildings will be able to be covered.

There is less existing evidence for the costs and impacts of carrying out these actions in the existing built environment (e.g. retrofitting) than there is evidence for new buildings. This project should specifically consider adaptation measures which can be applied to existing buildings and streets, as well as new-build infrastructure.

Bidders should set out whether it is appropriate to develop packages of adaptation measures, and/or focus on a minimum set of interventions. Where possible bidders should consider the balancing of investment of adaptation and avoided costs at a local/regional level. Bidders should clearly set out the potential for robustly implementing these kinds of adaptation options within their proposed modelling framework.

There are a number of additional adaptation actions outside of those in the physical built environment sector which have the potential to significantly reduce adverse impacts of extreme urban heat. These include behavioural changes, such

as changing working patterns or sleeping conditions. These are considered to be out of the scope of this project, which should focus on the investment and policy need for the built environment sector (e.g. planning and buildings). However, we welcome alternative approaches should bidders be able to outline robust methodology for including these interventions in the project scope, budget and timelines.

Bidders should clearly set out the potential for robustly implementing these kinds of adaptation options within their proposed modelling framework.

- **Impact metrics**

One of the aims of this project is to calculate a cost-optimal adaptation scenario which could form the basis of future targets or standards. The reduction in risk due to this adaptation scenario, as well as the baseline risk in the absence of adaptation should be reported in terms of summary ‘impact metric(s)’ (see task 2.1B in the methodology document). The CCC suggests a metric to measure this level could be the probability of exceeding a range of variable indoor/outdoor temperatures integrated by people impacted (i.e. the cost-optimal adaptation scenario involves investing in resilience to limit the number buildings over these thresholds and the range of people impacted in a heat event). Bidders’ suggestions for an alternative or modified metric are welcome and should be set out in the bid. The finalised metric must be agreed with the CCC.

- **Spatial scope and spatial resolution**

The spatial extent of this research should cover the whole of the UK – including England, Scotland, Wales and Northern Ireland. This project will also require analysis at the city or sub-city scale. Bidders should set out how this scale analysis will be achieved – e.g. through using case study or street-scale archetypes. We would like the project to consider the costs and benefits of different packages of adaptation action to reduce the impacts of extreme temperatures in urban areas and buildings in the UK. To do this, we anticipate some urban-scale and some building-scale analysis will be required. We do not require bidders to necessarily carry out bespoke modelling. Bids should set out a method for estimating the impacts on indoor temperatures of different building types and be able to scale these up nationally.

Where possible, we ask that risk and adaptation in all tasks are assessed at a spatially granular level. The CCC’s preference is that outputs can be presented at ward level, with analysis conducted at spatial resolutions of around < 10 km grid squares. However, we welcome feasible alternative options from bidders. Bidders should explain their approach to spatial resolution in the bid. Suppliers will need to agree the final spatial resolution with the CCC and the steering group.

- **Sensitivity scenarios**

To understand the uncertainty in the results of this project, a sensitivity analysis must be undertaken. The required scenarios for testing sensitivity in this project are specified in the methodology document (Task 2.4A and annex 10). Annex 10 sets out consistent, standard sources of vulnerability and exposure data. Ideally,



this project and the CCC's project on heat-health risks should use the same metrics for sensitivity scenarios where applicable.

For this project it is expected that bidders should assess three scenarios: a high climate change scenario, a high socio-vulnerability scenario (for example, one that leads to high exposure of people and urban areas to heat impacts), and a worst-case scenario that combines the previous two. Under the high exposure and vulnerability scenario, analysis should use ONS population projections as on slide 31. These should inform vulnerability and exposure scenarios, including as inputs to urban development modelling for the sensitivity tests.

Bidders should set out their ability to deliver on these sensitivity scenarios as part of their response.

Some required data may not be publicly available and there may be delays in accessing data. To mitigate this challenge, we ask that suppliers prepare a data request form as an annex to their bid specifying the data they require, the organisation they require it from (if known) and details about the preferred granularity and format of the data.

Wider CCRA4 datasets of collated household and population statistics at the UK-scale will be available for analysis. CCC-commissioned data on UK residential building stock archetypes for our Seventh Carbon Budget analysis will also be available. CIBSE are currently updating DSY weather data for UKCP18 projections and we expect to be able to access these. There may also be relevant reports and data on cooling demand and urban heat from the Department for Energy Security & Net Zero's Climate Services for a Net Zero Resilient World (CS-N0W) project, which should be complete by 2024.

### **Phase 3: Cross-cutting Analysis and Reporting**

Phase 3 consists of 2 tasks that are required to ensure the results of the analysis are communicated effectively and appropriately. All outputs should be thoroughly but proportionally quality assured before they are shared and bids should detail proposed processes for quality control and assurance. Any assumptions used in the work or limitations of the analysis should be clearly documented.

#### **Task 3.1: Handover of models and datasets**

Where a bespoke model has been produced for this project, or if agreed with an existing model, models and datasets should be transferred to the CCC such that the CCC can use them for further analysis as needed. To enable this, models and data must be fully documented and a teach-in session should be provided to CCC staff. In any instances where model or data handover will not be possible, for example because an established proprietary model has been used, this should be specified along with the reasons why as part of the bid. See section 4 for further information on project deliverables and section 5 on ownership and publication.

#### **Task 3.2: Reporting and presentation of results**

Results from this project must be presented in a final report, including an impactful executive summary written in non-technical language. The report should be developed with

proportionate consultation of the steering group to ensure the information provided is accurate and as relevant and useful as possible. Where relevant, diagrams, plots and infographics should be included and proportionate stakeholder consultation should guide the development of these to ensure they are useful and accessible. In addition to the results of the project tasks, the report should note any evidence gaps or suggestions for further work that have been identified. The report should not contain policy recommendations or other recommendations to the CCC. A presentation of key results to the CCC and the project steering group should also be provided. See section 4 for further information on project deliverables.

- **Key Deliverables and Activities**

#### **Communication Deliverables**

- Delivery of the project steering group, including setting up the group, organising and running meetings and providing brief written minutes of each meeting to be circulated to participants afterwards (task 1.1).
- A final report, including executive summary, setting out the methodology and findings of the project (task 3.2).
- A presentation of key results to the CCC and project steering group (task 3.2).
- Weekly meetings (may be adjusted to fortnightly after project inception) with the CCC project manager to share updates, discuss upcoming decisions and ensure the work is progressing as expected.

#### **Data and modelling deliverables (phase 2)**

- A UK-wide spatial risk assessment, quantifying the baseline costs and risk from climate change associated with the agreed hazards and impacts under the future climate and socioeconomic scenarios and the time periods specified in the methodology document. The distribution of these costs must also be quantified.
- A UK-wide spatial assessment of the effectiveness of adaptation packages to reduce this risk, designed in collaboration with stakeholders, and the costs and benefits of these.
- A modelled, cost-optimal scenario of adaptation that considers the effectiveness of adaptation actions and the investment required to deliver them, as detailed in the methodology document (Task 2.3A).
- A sensitivity analysis to establish the uncertainty associated with the baseline risks, modelled cost-optimal scenario of adaptation and required investments due to uncertainty in future climate scenarios and future exposure/vulnerability scenarios (see methodology document, task 2.4A and Annex 10).
- Results of any city or building-scale modelling in a relevant format. For example, this could include higher-resolution spatial data layers where city/street scale analysis has been carried out or spreadsheet datasets of building archetypes.
- An assumptions log and methodology statement for urban development models used for 2030 and 2050 scenarios.

All data and modelling deliverables should be provided with sufficient documentation to ensure the methodology and any assumptions are transparent and can be easily

understood and used by CCC analysts. All assumptions and figures should be adequately referenced and include any supporting workings. Specifically:

- Where spatial analysis has been conducted, outputs should include metadata and GIS layers of spatial data in an open-source format - either shapefile (.shp) or geodatabase (.gdb).
- Where infographics or other graphical representations are used they should be provided in an editable format.
- Where Excel workbooks are used these should be shared, fully unlocked and allow capability to update assumptions in future. Any such spreadsheets will be the property of the CCC.
- A handover session of models and data to the CCC, including guidance on how to use these for further in-house analysis, if required (task 3.2).

We envisage that bidders may need to make use of internal organisational knowledge to enable delivery and welcome this. However, this should not limit the transparency of approaches used in this project and all outputs should be provided in a publishable form. In the event of any limitations on sharing (e.g. in wider sharing beyond the CCC), these should be specified as part of the tender.

In addition to the above, we also expect interim deliverables to be required, including slide packs for the purposes of milestone meetings.

### **Ownership and Publication**

The key deliverables will be handed over to the CCC, who may choose to publish these as supporting evidence on their website. Excel workbooks should be unrestricted, and the CCC should have full access to all models and analysis to enable full quality assurance of results and assumptions. In any instances where model or data handover will not be possible, for example because an established proprietary model has been used, this should be specified along with the reasons why as part of the bid.

### **Quality Assurance**

All research tasks and modelling must be quality assured and documented.

Contractors should:

- Include a quality assurance (QA) plan that they will apply to the modelling in their bids. This should include specification of how the project steering group will provide an external review process.
- Specify who will take lead responsibility for ensuring quality assurance. This responsibility should rest with an individual not directly involved in the research or analysis.
- Provide a QA log to demonstrate the QA undertaken, which must identify who undertook the QA and the scope, type, and level of QA that has been undertaken.
- Propose someone of sufficient seniority within the contractor organisation to sign-off and take responsibility for project quality assurance. Acceptance of the work by the CCC will take this into consideration. The CCC reserves the right to refuse to

sign off outputs which do not meet the required standard specified in this invitation to tender.

The successful tenderer will be responsible for any work supplied by sub-contractors and should therefore provide assurance that all work in the contract is undertaken in accordance with the quality assurance expectation agreed at the beginning of the project.

### **Challenges**

We anticipate the following challenges may be associated with the above tasks. Bids should set out how these challenges will be addressed, and the measures used to mitigate risks to delivery arising from them.

- **Data availability.** Some required data may not be publicly available and there may be delays in accessing data. There are additional challenges with data availability in the devolved administrations. Bidders should identify data availability risks and plan for these in timelines.
- **Assumptions.** Robust assumptions need to be made regarding current and predicted risk and resilience as well as the adaptation strategies that can be implemented and their potential costs and impacts. There will also be some assumptions required to map the hazards to impact metrics. For some decisions, such as defining baseline pathways in phase 2, these assumptions will need to be informed by stakeholder consultation.
- **Scale issues.** This project will require bidders to aggregate the impacts of adaptation interventions at the building and street/city scale to the national level. This will require further robust assumptions and the use of methods such as scaling factors. Bidders should identify how to ensure these assumptions are clear and robust.
- **Aggregation of data across the UK.** Data availability is not uniform across the UK and nor is the policy landscape. This needs to be accounted for when making assumptions and spatially aggregating datasets.
- **Future projections.** Quantifying future projections of risk is non-trivial and a clear description of how this will be calculated should be outlined. This should include an approach to quantifying uncertainty and sensitivity testing (see the methodology document for phase 2, for more details). For this project, there are additional uncertainties through using future development models. Bidders should set out the data, projections and models they will use and their approach to uncertainties.
- **Effective and proportionate stakeholder engagement.** The steering group for this project will need to be convened in such a way as to ensure the participants are engaged and bought in to the process and discussions are balanced between different participants. The process should also be proportionate so that the necessary input is gathered without overburdening stakeholders.
- **Costing evidence.** Not all direct and indirect impacts will have a robust approach to providing a monetary value. Priority should be put on costing the largest impacts from climate change on the system being examined. Bidders should highlight which impacts from climate change, investment costs and co-benefits of adaptation action they will be able to provide a monetary value to in their bid.

- **Uncertainty in adaptation packages.** There are a range of adaptation actions outside of the built environment sector which we have considered out of scope of this research but should form part of adaptation planning. There are also uncertainties associated with the performance of different actions and their cost-benefits under future climate conditions (e.g. wilting street trees, mosquitos in blue spaces) which suppliers should consider.

### **Ethics**

All applicants will need to identify and propose arrangements for initial scrutiny and on-going monitoring of ethical issues. The appropriate handling of ethical issues is part of the tender assessment exercise and proposals will be evaluated on this as part of the 'addressing challenges and risks' criterion.

We expect contractors to adhere to the following GSR Principals:

- Sound application and conduct of social research methods and appropriate dissemination and utilisation of findings.
- Participation based on valid consent.
- Enabling participation.
- Avoidance of personal harm.
- Non-disclosure of identity and personal information.

### **Working Arrangements**

The successful contractor will be expected to identify one named point of contact through whom all enquiries can be filtered. A CCC project manager will be assigned to the project and will be the central point of contact.

The CCC would expect the choice of variables and attributes, methodological approaches and underlying assumptions to be developed through a collaborative process, with final agreement by the CCC. As such, we expect regular contact and check-ins with the contractor.

### **Skills and Expertise**

The CCC would like you to demonstrate that you have the expertise and capabilities to undertake the project. Your tender response should include a summary of each proposed team members' expertise and capabilities.

Contractors should propose named members of the project team and include the tasks and responsibilities of each team member. This should be clearly linked to the work programme, indicating the grade/ seniority of staff and number of days allocated to specific tasks. Contractors should identify the individual(s) who will be responsible for managing the project. Any amendments to roles and responsibilities would need to be approved with the CCC contract manager.

Skills and expertise that are likely to be required include, but are not limited to:

- Climate hazard and impact modelling.
- Spatial data analysis.

- Expertise in built environment modelling (this could be urban-scale, building-scale or for development planning) and heat impacts. We would expect the analysis to be led by or include a partner with expertise in urban or built environment modelling, although this is not a pre-requisite.
- Economic evidence and evaluation.
- Familiarity with adaptation policy and providing evidence for adaptation decision making.
- Expertise in convening stakeholder groups and co-developing analysis for a policy audience.
- Strong project management skills including expertise in managing inter-disciplinary projects delivered by more than one organisation.
- Strong written, visual presentation and verbal communication skills.

As the analysis spans several academic and professional disciplines, we would welcome bids from transdisciplinary consortia.

### **Consortium Bids**

In the case of a consortium tender, only one submission covering all of the partners is required but consortia are advised to make clear the proposed role that each partner will play in performing the contract as per the requirements of the technical specification. We expect the bidder to indicate who in the consortium will be the lead contact for this project, and the organisation and governance associated with the consortium. Any consortium would need to be tightly managed by an organisation with strong, proven programme management skills and an efficient cross-organisational management process.

Contractors must provide details as to how they will manage any sub-contractors and what percentage of the tendered activity (in terms of monetary value) will be sub-contracted.

If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided. However, please note the CCC reserves the right to require a successful consortium to form a single legal entity in accordance with Regulation 19 of the Public Contracts Regulations 2015 (as amended).

The CCC recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the CCC so that it can make a further assessment by applying the selection criteria to the new information provided.

### **Budget**

The budget for this project is £200,000-300,000 excluding VAT.

Contractors should provide a full and detailed breakdown of costs (including options where appropriate). This should include staff (and day rate) allocated to specific tasks.

Cost will be a criterion against which bids which will be assessed.

Payments will be linked to delivery of key milestones. The indicative milestones and phasing of payments can be adjusted and agreed with the contractor and Project Manager.

In submitting full tenders, contractors confirm in writing that the price offered will be held for a minimum of 90 calendar days from the date of submission. Any payment conditions applicable to the prime contractor must also be replicated with sub-contractors.

The Committee on Climate Change 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 standard terms and conditions of contract.

### **Timetable**

A suggested timetable for delivering the project is set out below. The bidder should include a proposed timetable for the project as part of their tender submission. The CCC is willing to be flexible and will consider alternative timetable proposals. The final outputs of the project must be delivered no later than June 2025, with phase 2 products delivered by end March 2025.

<b>Deliverables, activities, and timetable</b>	
<b>Date</b>	<b>Action/Deliverable</b>
w/c 17th June	Kick-off meeting
w/c 23 <sup>rd</sup> Sept	1st Interim results meeting (present draft results from phase 1)
w/c 20 <sup>th</sup> Jan 25	2 <sup>nd</sup> Interim results meeting (present draft results for Task 2.1-2.4)
w/c 24 <sup>th</sup> March 25	4 <sup>th</sup> Interim results meeting (present draft results for all phase 2 tasks and draft/plans for phase 3 tasks)
w/c 14 <sup>th</sup> April 25	Meeting to present and discuss first draft of final report to get feedback from the CCC for final editing of report
w/c 2 <sup>nd</sup> June 25	Delivery of final report and completion of the project

In addition to the formal reporting points, the CCC would expect to have weekly scheduled discussions to ensure the work is progressing as expected.

### **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

### 5.1. Introduction

- 5.1.1. The evaluation process will be conducted to ensure that Bids are evaluated fairly to ascertain the bidders who can demonstrate the required skills qualities, technical ability and capacity, commercial stability, and experience to ensure successful performance of the Contract.
- 5.1.2. The evaluation team may comprise staff from UKSBS and the Contracting Authority, and any specific external stakeholders the Contracting Authority deem required

### 5.2. Evaluation of Bids

- 5.2.1. Evaluation of Bids shall be based on a Selection questionnaire and Award criteria as clearly defined in the e-sourcing tool.

### 5.3. SELECTION questionnaire

- 5.3.1. The Selection questionnaire shall be marked against the following Selection pass / fail and scoring criteria.
- 5.3.2. The selection questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria.

Selection Pass/fail criteria		
Evaluation Envelope	Q No.	Question subject
<b>Qualification Questionnaire Part 1: Potential Supplier Information</b>		
Section 1	1.1(a) – p	Contact details and declaration
<b>Qualification Questionnaire Part 2: Exclusion Grounds</b>		
Section 1	1.2 (a)(i)	Administration, Management, supervisory body convictions
	1.2(a)(ii)	Participation in a criminal organisation
Section 1	1.2 (a) - (iii)	Corruption
Section 1	1.2 (a) - (iv)	Terrorist Offences or offences link to terrorist activities
Section 1	1.2 (a) - (v)	Money laundering or Terrorist financing
Section 1	1.2 (a) - (vi)	Child Labour and other forms of trafficking in human beings
Section 1	1.2 (a) - (vii)	Any other offence within the meaning of Article 57(1) of the Directive as defined by the law of any jurisdiction outside England, Wales or Northern Ireland.
Section 2	2.1(a)	Payment of tax or social security
Section 3	3.1	Detailed grounds for exclusion
Section 3	3.1 (a)	Situations summarised
Section 3	3.1 (b)	Breach of environmental law obligations
Section 3	3.1 (c)	Breach of social labour law obligations



Section 3	3.1 (d)	Breach of labour law obligations
Section 3	3.1(e)	Bankruptcy or subject to Insolvency
Section 3	3.1(f)	Guilty of grave professional misconduct
Section 3	3.1(g)	Distorting of competition
Section 3	3.1(h)	Conflict of Interest
Section 3	3.1(i)	Involved in preparation of procurement procedure
Section 3	3.1(j)	Prior performance issues
Section 3	3.1(k)	Serious Misrepresentation, withholding information, undue influence and undue advantages.
Section 3	3.1(l) to 3.2	Modern Slavery
<b>Qualification Questionnaire Part 3: Selection Questions</b>		
Section 4	4.1(a)	Financial statements filed with Companies House
Section 4	4.1(b)	Detailed accounts
Section 4	4.1(c)	Annual Turnover profit and loss accounts etc..
Section 4	4.2	Financial reliance upon others and guarantee
Section 6	6.1	Relevant experience and contract examples
Section 6	6.2	Subcontracting and healthy supply chains
Section 6	6.3	Technical and Professional Ability
Section 7	7.1	Insurance
Section 8	8.1(a)	General Data Protection Regulations
Section 8	8.1(b)	General Data Protection Regulations – Technical Facilities and Measures
Section 8	8.2(a)	Health and Safety
Section 8	8.3(a)(i) –(ii)	Modern Slavery
Part 3	SEL1.10 – 1.13	Information Security
Part 3	SEL2.12	General Data Protection Regulations and Data Protection Act 2018
Part 3	SEL2.19	PPN 01/22 - Contracts with suppliers from Russia or Belarus
Part 3	FOI1.1 – 1.2	Freedom of Information
	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 the any of the selection stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.	

- 5.3.3. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.
- 5.3.4. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.3.5. Questions marked ‘for information only’ do not contribute to the scoring model.

#### 5.4. AWARD questionnaire

- 5.4.1. The award questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.

**Award Pass / Fail criteria**

<b>Evaluation Envelope</b>	<b>Q No.</b>	<b>Question subject</b>
Qualification	AW1.1	Form of Bid
Qualification	AW1.2	Bid validity period
Qualification	AW1.3	Certificate of bona fide Bid
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to Contract Terms
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Commercial	AW5.6	Open Book Policy
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Request for Proposal response – received on time within the Jaggaer 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 the any of the selection stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.		

- 5.4.2. The Award stage of due process shall be marked against the following Award scoring criteria.
- 5.4.3. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.4.4. Questions marked 'for information only' do not contribute to the scoring model.

**Award 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 RFP. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

<b>Evaluation Envelope</b>	<b>Q No.</b>	<b>Question subject</b>	<b>Maximum Marks</b>	
			<b>Overall</b>	<b>Breakdown</b>
Commercial	AW5.1	Price	10%	10%
Technical	PROJ1.1	Methodology	90%	35%
Technical	PROJ1.2	Programme and Financial Management Skills		20%
Technical	PROJ1.3	Team Structure and Technical Expertise		25%

Technical	PROJ1.4	Social Value – Tackling Workforce Inequality MAC6.2		5%
Technical	PROJ1.5	Social Value – Fighting Climate Change MAC4.1		5%

## Award Evaluation of criteria

### Non-Commercial Elements

Each question will be evaluated 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.

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.

**Commercial Elements** will be evaluated on the following criteria.

Price will be evaluated using proportionate pricing (lowest bid / bid \* mark). A bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.

For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:

(Maximum marks available in this example being 12.5)

Bidder A Score =  $50000/50000 \times 12.5 = 12.5$

Bidder B Score =  $50000/80000 \times 12.5 = 7.81$

Bidder C Score =  $50000/100000 \times 12.5 = 6.25$

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.

The lowest score possible is 0.

## 5.5. Evaluation process

5.5.1. 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>RFP logged upon opening in alignment with UKSBS's procurement procedures.</li> <li>Any RFP Bid 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 Bids 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> </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 Selection and / Award criteria.</li> </ul>
Moderation meeting (if required to reach	<ul style="list-style-type: none"> <li>To review the outcomes of the Commercial review</li> <li>To agree final scoring for each Bid, relative rankings of the Bids</li> </ul>

an award decision)	<ul style="list-style-type: none"> <li>• To confirm contents of the Standstill letters to provide details of scoring and relative feedback on the unsuccessful Bidders response in comparison with the successful Bidders response</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 / Request for Proposal response / Bid and / or Clarifications from the Bidder</li> <li>○ Taking up of Bidder references from the Bidders Customers.</li> </ul> </li> <li>• Financial Credit check for the Bidder</li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>• To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.</li> </ul>

## Section 6 – Evaluation Response Questionnaires

### 6.1. Qualification / Selection Questionnaire

- 6.1.1 Bidders should note that the Qualification / Selection Questionnaire is located within the **Jaggaer eSourcing Portal**.

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

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

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

### 6.2. Technical and Commercial Questionnaire

- 6.2.1 Bidders should note that the Technical and Commercial Questionnaire is located within the **Jaggaer eSourcing Portal**.

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

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

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

## Section 7 – General information

### 7.1. Introduction

- 7.1.1. The Contracting Authority wishes to establish a Contract for the provision of Projections Of Climate Risk(S) To Health And Health Services From Extreme Heat: Their Societal Impact And Cost, And The Cost And Effectiveness Of Adaptation Measures. The Contracting Authority is managing this procurement process in accordance with Public Procurement (as may be amended from time to time) (the “Regulations”). This is a services Contract being procured under the Open Procedure.
- 7.1.2. The Contracting Authority is procuring the Contract for its exclusive use.
- 7.1.3. UKSBS and the Contracting Authority logo, trademarks and other identifying marks are proprietary and may not be incorporated in the Companies response without or the Contracting Authority’s written permission.
- 7.1.4. The Bidder shall indemnify and keep indemnified UKSBS and the Contracting Authority against all actions, claims, demands, proceedings, damages, costs, losses, charges, and expenses whatsoever in respect of any breach by the Bidder of this document.
- 7.1.5. If there is any doubt with regard to the ambiguity of any question or content contained in this questionnaire then PLEASE ASK a clarification question, but please ensure that your question is via the formal clarification process in writing to the UKSBS representative nominated. No approach of any kind in connection with this opportunity should be made to any other person within or associated with UKSBS or the Contracting Authority. All information secured outside of this named contact shall have no legal standing or worth and should not be relied upon.
- 7.1.6. It remains the responsibility of the Bidder to keep UKSBS and the Contracting Authority informed of any matter that may affect continued qualification.
- 7.1.7. Prior to commencing formal evaluation, Submitted Responses will be checked to ensure they are fully compliant with the Pass / Fail criteria within the Evaluation model. Non-compliant Submitted Responses may be rejected by the Contracting Authority. Submitted Responses which are deemed by the Contracting Authority to be fully compliant will proceed to evaluation. These will be evaluated using the criteria and scores detailed in the matrix set out in [Section 5](#).
- 7.1.8. Whilst it is the Contracting Authority’s intention to purchase the majority of its services this Contract Arrangement from the Supplier(s) appointed this does not confer any exclusivity on the appointed Suppliers. The Contracting Authority reserve the right to purchase any services and services (including those similar to the services covered by this procurement) from any Supplier outside of this Contract.
- 7.1.9. The Contracting Authority reserves the right not to conclude a Contract as a result of the current procurement process. Bidders should review the contents of Section 7 paragraph 7.8.1 when considering submitting their Response.
- 7.1.10. The services covered by this procurement exercise have NOT been sub-divided into Lots.

- 7.1.11. The Contracting Authority shall utilise the Jaggaer eSourcing Portal available at <https://beisgroup.ukp.app.jaggaer.com/> to conduct this procurement. There will be no electronic auction following the conclusion of the evaluation of the Request for Proposal (RFP) responses. Bidders will be specifically advised where attachments are permissible to support a question response within the Jaggaer eSourcing portal.

All enquiries with respect to access to the eSourcing portal and problems with functionality within the portal must be submitted to Jaggaer eSourcing Helpdesk

**Phone** 08000 698 632

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

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

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

- 7.1.12. Please utilise the messaging system within the Jaggaer eSourcing Portal located at <https://beisgroup.ukp.app.jaggaer.com/> within the timescales detailed in [Section 3](#). If you have any doubt as to what is required or will have difficulty in providing the information requested. Bidders should note that any requests for clarifications may not be considered by the Contracting Authority if they are not articulated by the Bidder within the discussion forum within the Jaggaer eSourcing Portal.
- 7.1.13. Bidders should read this document, and all attachment, messages and the response envelopes located within the Jaggaer eSourcing portal carefully before completing the Response submission. Failure to comply with any of these instructions for completion and submission of the Submitted Response may result in the rejection of the Response. Bidders are advised therefore to acquaint themselves fully with the extent and nature of the services and contractual obligations. These instructions constitute the Conditions of Response. Participation in the RFP process automatically signals that the Bidder accepts these Conditions.
- 7.1.14. All material issued in connection with this RFP shall remain the property of the Contracting Authority and shall be used only for the purpose of this procurement. All Due Diligence Information shall be either returned to the Contracting Authority or securely destroyed by the Bidder (at the Contracting Authority's option) at the conclusion of the procurement.
- 7.1.15. The Bidder shall ensure that each and every sub-contractor, consortium member and adviser abide by the terms of these instructions and the Conditions of Response.
- 7.1.16. The Bidder shall not make contact with any other employee, agent or consultant of UKSBS or the Contracting Authority or Customer who are in any way connected with this procurement during the period of this procurement, unless instructed otherwise by the Contracting Authority.
- 7.1.17. The Contracting Authority shall not be committed to any course of action as a result of:
- 7.1.17.1. issuing this RFP or any invitation to participate in this procurement ;
  - 7.1.17.2. an invitation to submit any Response in respect of this procurement;
  - 7.1.17.3. communicating with a Bidder or a Bidder's representatives or agents in respect of this procurement; or



- 7.1.17.4. any other communication between UKSBS or the Contracting Authority (whether directly or by its agents or representatives) and any other party.
- 7.1.18. Bidders shall accept and acknowledge that by issuing this RFP the Contracting Authority shall not be bound to accept any Response and reserves the right not to conclude a Contract for some or all of the services for which Responses are invited.
- 7.1.19. The Contracting Authority reserves the right to amend, add to or withdraw all or any part of this RFP at any time during the procurement.
- 7.1.20. Bidders should not include in the Response any extraneous information which has not been specifically requested in the RFP including, for example, any sales literature, standard terms of trading etc. Any such information not requested but provided by the Bidder shall not be considered by the Contracting Authority.
- 7.1.21. If the Bidder is a consortium, the following information must be provided: full details of the consortium; and the information sought in this RFP in respect of each of the consortium's constituent members as part of a single composite response. Potential Providers should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium as indicated in the relevant section of the selection questionnaire SEL1.9 specifically refers. If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided as indicated in the relevant section of the RFP. However, please note the Contracting Authority reserves the right to require a successful consortium to form a single legal entity in accordance with regulation 19(6) of the Regulations. The Contracting Authority recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the Contracting Authority so that it can make a further assessment by applying the selection criteria to the new information provided and consider rejection of the Response if the Contracting Authority reasonably consider the change to have a material impact of the delivery of the viability of the Response.

## **7.2. Bidder conference**

- 7.2.1. A Bidders' Conference will not be held in conjunction with this procurement.

## **7.3. Confidentiality**

- 7.3.1. Subject to the exceptions referred to in paragraph 7.3.2, the contents of this RFP are being made available by the Contracting Authority on condition that:
  - 7.3.1.1. Bidders shall at all times treat the contents of the RFP and any related documents (together called the 'Information') as confidential, save in so far as they are already in the public domain;
  - 7.3.1.2. Bidders shall not disclose, copy, reproduce, distribute, or pass any of the Information to any other person at any time or allow any of these things to happen;
  - 7.3.1.3. Bidders shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a Response; and
  - 7.3.1.4. Bidders shall not undertake any publicity activity within any section of the media in relation to this procurement

- 7.3.2. Bidders may disclose, distribute, or pass any of the Information to the Bidder's advisers, sub-contractors or to another person provided that either:
- 7.3.2.1. This is done for the sole purpose of enabling a Response to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Bidder; or
  - 7.3.2.2. The disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract arising from it; or
  - 7.3.2.3. The Bidder is legally required to make such a disclosure
- 7.3.3. In paragraphs 7.3.1 and 7.3.2 above the term 'person' includes but is not limited to any person, firm, body, or association, corporate or incorporate.
- 7.3.4. UKSBS and the Contracting Authority may disclose detailed information relating to Responses to its employees, agents or advisers and they may make any of the Contract documents available for private inspection by its officers, employees, agents, or advisers. UKSBS and the Contracting Authority also reserve the right to disseminate information that is materially relevant to the procurement to all Bidders, even if the information has only been requested by one Bidder, subject to the duty to protect each Bidder's commercial confidentiality in relation to its Response (unless there is a requirement for disclosure as explained in paragraphs 7.4.1 to 7.4.3 below).
- 7.3.5. 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. Subject to section 7.4 below, the information will not be disclosed outside Government. Bidders taking part in this RFP consent to these terms as part of the competition process.

- 7.3.6. 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 from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

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

- 7.3.7. The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this RFP to reflect any changes introduced by the GSC. In particular where this RFP 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](#)
- [Find a Tender](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

## 7.4. Freedom of information

- 7.4.1. 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 and the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 7.4.2. 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.
- 7.4.3. 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.
- 7.4.4. Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 7.4.5. Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including RFP templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by 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 RFP Bidders are agreeing that their participation and contents of their Response may be made public.

## 7.5. Response Validity

- 7.5.1. Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

## 7.6. Timescales

- 7.6.1. [Section 3](#) of the RFP 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.

## 7.7. The Contracting Authority's Contact Details

- 7.7.1. 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.
- 7.7.2. Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the Jaggaer eSourcing portal. Failure to follow this requirement will result in disqualification of the Response.

## 7.8. Preparation of a Response

- 7.8.1. Bidders must obtain for themselves at their own responsibility and expense all information necessary for the preparation of Responses. Bidders are solely responsible for all costs, expenses and other liabilities arising in connection with the preparation and submission of their Response and all other stages of the selection and evaluation process. Under no circumstances will UKSBS or the Contracting Authority, or any of their advisers, be liable for any such costs, expenses or liabilities borne by Bidders or their sub-contractors, suppliers or advisers in this process.
- 7.8.2. Bidders are required to complete and provide all information required by the Contracting Authority in accordance with the Conditions of Response and the Request for Proposal. Failure to comply with the Conditions and the Request for Proposal may lead the Contracting Authority to reject a Response.
- 7.8.3. The Contracting Authority relies on Bidders' own analysis and review of information provided. Consequently, Bidders are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Responses and to undertake any investigations they consider necessary in order to verify any information provided to them during the procurement.
- 7.8.4. Bidders must form their own opinions, making such investigations and taking such advice (including professional advice) as is appropriate, regarding their Responses, without reliance upon any opinion or other information provided by the Contracting Authority or their advisers and representatives. Bidders should notify the Contracting Authority promptly of any perceived ambiguity, inconsistency, or omission in this RFP, any of its associated documents and/or any other information issued to them during the procurement.

- 7.8.5. Bidders must ensure that each response to a question is within any specified page limit. Any responses with pages in excess of the page limit will only be considered up to the point where they meet the page limit, any additional pages beyond the volume defined in the page limit will not be considered by the evaluation panel.
- 7.8.6. Bidders must ensure that each response to a question is not cross referenced to a response to another question. In the event of a Bidder adding a cross reference it will not be considered in evaluation.

## **7.9. Submission of Responses**

- 7.9.1. The Response must be submitted as instructed in this document through the e-sourcing tool. Failure to follow the instruction within each Section of this document, to omit responses to any of the questions or to present your response in alignment with any guidance notes provided may render the Response non-compliant and it may be rejected.
- 7.9.2. The Contracting Authority may at its own absolute discretion extend the closing date and the time for receipt of Responses specified [Section 3](#).
- 7.9.3. Any extension to the RFP response period will apply to all Bidders.
- 7.9.4. Any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Failure to adhere to this requirement will result in the Response not being considered.
- 7.9.5. The Contracting Authority do not accept responsibility for the premature opening or mishandling of Responses that are not submitted in accordance with the instructions of this document.
- 7.9.6. The Response and any documents accompanying it must be in the English language
- 7.9.7. Bidders must submit their response through the e-sourcing tool, unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority. Responses received by any other method than requested will not be considered for the opportunity.
- 7.9.8. Responses will be submitted any time up to the date indicated in [Section 3](#). Responses received before this deadline will be retained in a secure environment, unopened until this deadline has passed.
- 7.9.9. Responses received after the date indicated in [Section 3](#) 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
  - 7.9.9.1. The Bidder must demonstrate irrefutable evidence in writing they have made best endeavours to ensure the Response was received on time and that the issue was beyond their control.
  - 7.9.9.2. Any request for a late Response to be considered must be emailed to the Buyer in [Section 3](#) in advance of 'the deadline' if a bidder believes their Response will be received late.
  - 7.9.9.3. The Contracting Authority reserves the right to accept or reject any late Response without justification to the affected Bidder and make no

guarantee it will consider any request for a late Response to be considered.

- 7.9.10. Do not seek changes to the Bid after responses have been submitted and the deadline (date and time) for receipt of responses has passed.

## **7.10. Canvassing**

- 7.10.1. Any Bidder who directly or indirectly canvasses any employee, or agent of UKSBS, the Contracting Authority, or its members or any of its employees concerning the establishment of the Contract or who directly or indirectly obtains or attempts to obtain information from any such officer, member, employee, or agent or concerning any other Bidder, Response or proposed Response will be disqualified.

## **7.11. Disclaimers**

- 7.11.1. Whilst the information in this RFP, Due Diligence Information and supporting documents has been prepared in good faith, it does not purport to be comprehensive, nor has it been independently verified.
- 7.11.2. Neither UKSBS, the Contracting Authority, nor their advisors, nor their respective directors, officers, members, partners, employees, other staff or agents:
- 7.11.2.1. makes any representation or warranty (express or implied) as to the accuracy, reasonableness, or completeness of the RFP; or
  - 7.11.2.2. accepts any responsibility for the information contained in the RFP or for their fairness, accuracy or completeness of that information nor shall any of them be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.
- 7.11.3. Any persons considering making a decision to enter into contractual relationships with the Contracting Authority following receipt of the RFP should make their own investigations and their own independent assessment of the Contracting Authority and its requirements for the services and should seek their own professional financial and legal advice. For the avoidance of doubt the provision of clarification or further information in relation to the RFP or any other associated documents (including the Schedules) is only authorised to be provided following a query made in accordance with Paragraph 7.15 of this RFP.

## **7.12. Collusive behaviour**

- 7.12.1. Any Bidder who:
- 7.12.1.1. fixes or adjusts the amount of its Response by or in accordance with any agreement or arrangement with any other party; or
  - 7.12.1.2. communicates to any party other than UKSBS, or the Contracting Authority the amount or approximate amount of its proposed Response or information which would enable the amount or approximate amount to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Response or insurance or any necessary security); or
  - 7.12.1.3. enters into any agreement or arrangement with any other party that such other party shall refrain from submitting a Response; or

- 7.12.1.4. enters into any agreement or arrangement with any other party as to the amount of any Response submitted; or
- 7.12.1.5. offers or agrees to pay or give or does pay or give any sum or sums of money, inducement or valuable consideration directly or indirectly to any party for doing or having done or causing or having caused to be done in relation to any other Response or proposed Response, any act or omission,

shall (without prejudice to any other civil remedies available to the Contracting Authority and without prejudice to any criminal liability which such conduct by a Bidder may attract) be disqualified.

### **7.13. No inducement or incentive**

- 7.13.1. The RFP is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a Bidder to submit a Response or enter into the Contract or any other contractual agreement.

### **7.14. Acceptance of the Contract**

- 7.14.1. The Bidder in submitting the Response undertakes that in the event of the Response being accepted by the Contracting Authority and the Contracting Authority confirming in writing such acceptance to the Bidder, the Bidder will within 7 days of being called upon to do so by the Contracting Authority execute the Contract in the form set out in the Contract Terms or in such amended form as may subsequently be agreed.
- 7.14.2. The Contracting Authority shall be under no obligation to accept the lowest priced or any Response.

### **7.15. Queries relating to the Response**

- 7.15.1. All requests for clarification about the requirements or the process of this procurement shall be made in through the Jaggaer eSourcing portal unless the Jaggaer eSourcing portal is unavailable due to system maintenance or failure, in this instance all clarifications shall be by email to the contact defined in [Section 3](#).
- 7.15.2. The Contracting Authority will endeavour to answer all questions as quickly as possible but cannot guarantee a minimum response time.
- 7.15.3. In the event of a Bidder requiring assistance uploading a clarification to the Jaggaer eSourcing portal they should use the contact details defined in [Section 3](#).
- 7.15.4. No further requests for clarifications will be accepted after 7 days prior to the date for submission of Responses.
- 7.15.5. In order to ensure equality of treatment of Bidders, the Contracting Authority intends to publish the questions and clarifications raised by Bidders together with the Contracting Authority's responses (but not the source of the questions) to all participants on a regular basis.
- 7.15.6. Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if the Contracting Authority at its sole discretion does not either; consider the query to be of a commercially confidential nature or one

which all Bidders would potentially benefit from seeing both the query and the Contracting Authority's response, the Contracting Authority will:

- 7.15.6.1. invite the Bidder submitting the query to either declassify the query and allow the query along with the Contracting Authority's response to be circulated to all Bidders; or
  - 7.15.6.2. request the Bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query prior to the end of the closing date and time for Bidder clarifications.
- 7.15.7. The Contracting Authority reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would or would be likely to prejudice its commercial interests.

## **7.16. Amendments to Response Documents**

- 7.16.1. At any time prior to the deadline for the receipt of Responses, the Contracting Authority may modify the RFP by amendment. Any such amendment will be numbered and dated and issued by the Contracting Authority to all prospective Bidders. In order to give prospective Bidders reasonable time in which to take the amendment into account in preparing their Responses, the Contracting Authority may, at its discretion, extend the time and/or date for receipt of Responses.

## **7.17. Modification and withdrawal**

- 7.17.1. Bidders may modify their Response where allowable within the Jaggaer eSourcing portal. No Response may be modified after the deadline for submission of Responses.
- 7.17.2. Bidders may withdraw their Response at any time prior the deadline for submission of Responses or any other time prior to accepting the offer of a Contract. The notice to withdraw the Response must be in writing and sent to the Contracting Authority by recorded delivery or equivalent service and delivered to the Head of Policy UKSBS at UK Shared Business Services Ltd, Procurement, Polaris House, North Star Avenue, Swindon, Wiltshire, SN2 1ET

## **7.18. Right to disqualify or reject**

- 7.18.1. The Contracting Authority reserves the right to reject or disqualify a Bidder where
- 7.18.1.1. the Bidder fails to comply fully with the requirements of this Request for Proposal or presents the response in a format contrary to the requirements of this document; and/or
  - 7.18.1.2. the Bidder is guilty of serious misrepresentation in relation to its Response; expression of interest; or the Response process; and/or
  - 7.18.1.3. there is a change in identity, control, financial standing or other factor impacting on the selection and/or evaluation process affecting the Bidder.

## **7.19. Right to cancel, clarify or vary the process**

- 7.19.1. The Contracting Authority reserves the right to:
- 7.19.1.1. cancel the evaluation process at any stage; and/or
  - 7.19.1.2. require the Bidder to clarify its Response in writing and/or provide additional information. (Failure to respond adequately may result in the Bidder not being selected),



## 7.20. Notification of award

- 7.20.1. The Contracting Authority will notify the successful Bidder of the Contract award in writing and will publish an Award Notice in Find a Tender in accordance with the Regulations within 30 days of the award of the contract.
- 7.20.2. As required by the Regulations all successful and unsuccessful Bidders will be provided with an email advising the outcome of the submission of their RFP response.

### What makes a good bid – some simple do's ☺

#### DO:

- 7.21.1. Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.21.2. 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 RFP 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.
- 7.21.3. 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.
- 7.21.4. 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.
- 7.21.5. Do ensure you utilise the Jaggaer eSourcing messaging system to raise any clarifications to our RFP. 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
- 7.21.6. Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid (unless the question specifically allows you to do so) the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.21.7. Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.21.8. Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.21.9. Do provide clear, concise, and ideally generic contact details; telephone numbers, e-mails and fax details.
- 7.21.10. Do complete all questions in the questionnaire or we may reject your Bid.

7.21.11. 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.

7.21.12. Do check and recheck your Bid before dispatch.

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

### DO NOT

- 7.22.1. Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.22.2. 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.
- 7.22.3. Do not share the Procurement documents, they may be confidential and should not be shared with anyone without the Buyers written permission.
- 7.22.4. 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.
- 7.22.5. Do not contact any UKSBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.22.6. Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.22.7. Do not offer UKSBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.22.8. Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.22.9. Do not cross reference answers to external websites (unless the question specifically allows you to do so) or other parts of your Bid, the cross references and website links will not be considered.
- 7.22.10. Do not exceed page limits, the additional pages will not be considered.
- 7.22.11. Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.22.12. 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 Jaggaer eSourcing portal. Responses received by any other method than requested will not be considered for the opportunity.

## 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 “RFP Response”</b>	means the Bidders formal offer in response to this Request for Proposal
<b>“Bidder(s)”</b>	means the organisations being invited to respond to this Request for Proposal
<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 RFP 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 Bodies”</b>	means the Contracting Authority and any other contracting authorities described in the Find a Tender and Contract Notice
<b>“Contracting Authority”</b>	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
<b>“Customer”</b>	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
<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 Request for Proposal
<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>“Find a Tender”</b>	Means the UK Government Portal that superseded the OJEU as from 1/1/2021 <a href="https://www.find-tender.service.gov.uk/Search">https://www.find-tender.service.gov.uk/Search</a>
<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 a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
<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>“Request for Proposal” or “RFP”</b>	means this Request for Proposal documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. <b>NOTE:</b> This document is often referred to as an Invitation to Tender within other organisations
<b>“Supplier(s)”</b>	means the organisation(s) 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>