

Invitation to Quote



Department for Energy Security & Net Zero

**Invitation to Quote (ITQ) on behalf of Department for Business,
Energy Security & Net Zero (DESNZ)**

**Subject: Phase 1- Scoping Study on Longevity of Insulation
Retrofits**

Sourcing Reference Number: PS23104

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Section 1 – About UK Shared Business Services

Putting the business into shared services

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

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

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

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

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

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

UK SBS currently manages £700m expenditure for its Contracting Authorities.

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

Privacy Statement

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

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

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

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

Privacy Notice

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

YOUR DATA

The Contracting Authority will process the following personal data:

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

Purpose

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

Legal basis of processing

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

Recipients

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

Retention

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

Your Rights

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

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

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

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

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

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

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

International Transfers

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

Complaints

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

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

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

Contact Details

The data controller for your personal data is:

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

You can contact the Data Protection Officer at:

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

Section 2 – About the Contracting Authority

Department for Energy, Security and Net Zero (DESNZ)

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

Our responsibilities

- delivering security of energy supply
- ensuring properly functioning energy markets
- encouraging greater energy efficiency
- seizing the opportunities of net zero to lead the world in new green industries

Section 3 – Working with the Contracting Authority

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

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	Department for Energy Security and Net Zero 1 Victoria Street, London, SW1H 0ET
3.2.	Buyer name	Alex Marks
3.3.	Buyer contact details	professionalservices@uksbs.co.uk
3.4.	Estimated value of the Opportunity	£60,000.00 Excluding VAT
3.5.	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25. 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.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Find a Tender	Friday, 16 th June 2023
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Monday, 10 th July 2023 @ 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Wednesday, 12 th July 2023 @ 11:00
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (the Deadline)	Friday, 21 st July 2023 @ 11.00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Friday, 28 th July 2023 @ 14.00
3.11.	Anticipated Contract Award date	Friday, 4 th August 2023
3.12.	Anticipated Contract Start date	Monday, 28 th August 2023
3.13.	Anticipated Contract End date	Thursday, 29 th February 2024
3.14.	Bid Validity Period	90 Days
3.15.	Anticipated Contracts Finder notice and redacted contract publication if applicable.	Within 30 days of award

Section 4 – Specification

1. Introduction
<p>This is the first phase of a two phase project looking to quantify the impact of degradation of insulation retrofits over time, and characterise the effective lifetime of different insulation measures. This first phase will primarily be concerned with reviewing available literature and data to summarise the current state of knowledge on longevity and degradation of retrofits. This will be used to deliver recommendations on methodology and sampling for a representative survey of the UK's housing stock to gather data on performance over a 40-year period of the most commonly installed insulation measures.</p> <p>This first phase of the project will deliver the following outputs:</p> <ol style="list-style-type: none"> 1. A literature review 2. The technical analysis report 3. The field study sampling & methodology recommendations
2. Aims and Objectives
<p>This is the first phase of a two phase project looking into gathering evidence and developing understanding of long-term performance and degradation of commonly installed energy efficiency retrofits in the UK.</p> <p>The overarching aims of this project are to:</p> <ul style="list-style-type: none"> • Quantify the impact of degradation on energy performance over time in a representative sample of commonly installed insulation retrofits to inform approaches to maintenance and replacement. • Determine the effective lifetime of retrofit measures and metrics to identify those nearing end of life. • Characterise poor installation, including likelihood and severity of impacts, and deliver quantitative evidence for the energy performance impacts of these. <p>Specific objectives for this phase are listed in Section 3 below.</p>
3. Objectives
<p>Specific objectives for this scoping study will be to:</p> <ol style="list-style-type: none"> 1. Review literature to understand current state of knowledge on longevity and degradation of insulation retrofits over time. 2. Develop an approach for classifying poor installations based on the potential impact and potential for avoiding the issue in the first place. 3. Identify and analyse existing data sources which may be used to provide initial insights and monitor performance of retrofits. 4. Design and scope field survey sampling and methodology to gather evidence addressing identified gaps. This includes: <ul style="list-style-type: none"> • <i>Identifying suitable methods for measurement of performance and degradation.</i> • <i>Proposing credible means for recruiting a sample of representative buildings.</i>

4. Background to the Requirement

Context

The Heat and Buildings Strategy sets out a fabric first approach to heat decarbonisation and states consumers should prioritise measures with 20-year payback periods, but there is a lack of evidence on how long these retrofits will last beyond this and current lifespan estimates are based on assumptions. Being able to confidently identify measures with longer lifetimes negates unnecessary replacement of insulation and ensures more cost-effective achievement of net zero targets.

The narrative around building fabric upgrades implies that benefits are permanent, for example the Energy Savings Trust advice on Cavity Wall Insulation estimates an ongoing annual bills saving of £690 for a 'typical' detached house¹. However, they will experience deterioration over time and require maintenance or replacement. For example, evidence from new builds shows a 9% loss of airtightness from wear of window seals in the first 3 years². Findings from analyses of the longitudinal data from the National Energy Efficiency Data (NEED) Framework have shown that some retrofit measures such as loft insulation see a decline in energy saving over the first few years post-retrofit and while some of this may be down to a 'rebound effect' it is unclear what else contributes to this. A recent study in Korea carrying out laboratory testing of solid polystyrene insulation measured a fall in thermal resistance of up to 40% over a 15 year period³. However, there is no representative quantitative evidence of longer-term degradation of common insulation measures installed in the UK.

For the purpose of this project degradation of insulation materials will be assumed to cover cumulative damage or deterioration which falls into one of the following three categories:

- Carelessness – This would cover any damage from poor installation or workmanship including unintended consequences of inappropriate installations.
- Accidental – This covers any damage arising from accidents, both anthropogenic and natural (e.g. storms) in cause.
- Material Wear & Tear – This covers damage due to gradual material wear and tear, or chemical/physical deterioration, which may arise as an unintended consequence of an installation.

This research project will support policy on retrofit by addressing the following evidence gaps.

1. Long-term degradation in energy performance of commonly installed insulation retrofits

The National Energy Efficiency Data (NEED) Framework gathers meter data on domestic properties, and has been used to track the impact of energy efficiency measures including insulation retrofits for each year after installation. So far longitudinal data on measures covers less than 10 years and it uses total household energy consumption as a proxy for performance which may be misleading because energy consumption depends on more than just the thermal performance of the building fabric.

¹ <https://energysavingtrust.org.uk/advice/cavity-wall-insulation/>

² <https://www.mdpi.com/2071-1050/13/5/2784/htm>

³ <https://link.springer.com/article/10.1007/s10765-017-2318-3>

Current modelling assumptions assume a lifespan of 40-50 years for insulation retrofits, which is an assumption made on the basis that insulation is not likely to be replaced until a major refurbishment is carried out which is assumed to occur at least every 50 years (which is the assumed lifetime of a house). There is virtually no reliable quantitative evidence on the longer term degradation in performance of these measures in the UK over a 40-50 year period.

A nationally representative survey of homes is needed to catalogue impacts of degradation in insulation retrofits. This will need to involve technical monitoring on site and in a laboratory to measure thermal performance, and household surveys to gather evidence of impacts beyond energy consumption, for example negative health consequences.

2. Effective lifetimes of retrofit measures

Degradation of retrofits over time can contribute to a performance gap with an impact upon the actual payback period that SAP does not account for⁴. Understanding longevity of performance ensures long-term effective measures are prioritised and appropriate maintenance strategies are put in place where required. The profile of degradation over time can help assess the useful life of a measure, more accurately calculate the lifetime performance, and help decide when measures need to be replaced.

For example while some measures may experience an initial ‘bedding-in’ loss of performance before plateauing and having quite steady performance over a long period, other measures may steadily decline in performance and reach a tipping point at which the economic case for replacement outweighs the diminishing energy savings of the old measure. Quantitative evidence of this is key to providing good guidance and supporting measures with the best long term performance.

3. The impacts of poor installation practices on performance and how these relate to degradation.

A related issue is the question of poor installation of retrofit measures which is a common problem leading to worse than expected performance and durability⁵. Indeed, Ofgem figures from ECO2 indicate approx. 10% of retrofits installed through the scheme failed technical monitoring (even though some of these were minor fails related to technicalities and scheme compliance)⁶. Action to rectify poor installation will often differ from maintenance required to address degradation. Incorrect or inappropriate installation and its impact on performance are not well distinguished from degradation over the retrofit’s lifetime.

Currently SAP does not account for poor installation or lifetime degradation of a retrofit measure. While greater levels of technical monitoring involved under PAS 2035 aim to reduce poor installation, independent research is needed to quantify the impact of poor installation and distinguish this from degradation that occurs over the lifetime of the retrofit.

A systematic classification of poor installation is needed which can categorise a poor installation according to its impact on energy performance, as well as the how easily it may have been avoided. At present studies and evidence on poor

⁴ <https://doi.org/10.1016/j.apenergy.2018.03.096>

⁵ <https://journals.sagepub.com/doi/10.1177/1420326X211027197>

⁶ <https://www.ofgem.gov.uk/publications/energy-company-obligation-eco2-final-determination-report>

installation uses a wide range of definitions of poor installation which makes assessing the impacts and identify appropriate prevention challenging.

5. Scope

This project will involve identifying existing evidence, research, and data covering the 3 most common insulation retrofits installed, namely:

- Cavity Wall Insulation
- Loft insulation
- and Solid wall insulation (both internal and external)

This survey methodology design and recommendations should outline an approach for gathering a representative sample of field measurements which covers:

- All of the UK
- Measures installed over the last 40 years
- Poor quality installations/retrofits

This project will focus on thermal performance and impacts of degradation on energy efficiency, with consideration of secondary impacts on health of occupants and structure of building.

6. Requirement

Research Questions

The primary aim of this project is to gather data on impacts of degradation and poor installation of common retrofits in a representative sample of homes, and analyse this to determine energy performance implications. This research will focus on insulation measures. The specific research questions this project will address over Phase 1 & 2 are:

- 1) How does the performance of commonly installed insulation measures degrade over time?
- 2) What is the effective lifetime of common insulation measures?
- 3) What are the impacts of poor installation practices on performance, how likely and severe are these, and how do these relate to degradation?

Methodology Overview

Literature Review

This will involve a systematic review of academic and grey literature focusing on the critical types of schemes, retrofit measures, and applicable maintenance. This will include:

- Characterising available evidence on performance of retrofits, installation practices/issues, and maintenance and repair strategies over the past 40 years;
- Analyse available evidence of poor installations to develop an approach for categorising poor installations on the basis of the potential impact on performance and preventability;
- Reviewing case studies and results of previous Departmental studies and research projects, which would be provided to the successful bidder if not already published publicly.

Analysis using existing data

This project will need to identify, gather and analyse any data to quantify and evaluate the quality of existing evidence and outline how this data may be used to track retrofit performance in future. Key tasks will include:

- Identifying suitable existing and regularly updated quantitative data source or smart meter data that could be used to analyse or track thermal performance of retrofits;
- Carrying out simple statistical analysis to determine effect size and significance of changes in performance in identified data;
- Outline an analysis approach that can use identified datasets to track energy performance of specific retrofit measures in homes in future.

Site survey scoping & methodology development

The final key aspect of this project will involve scoping out a suitable survey sample and methodology for gathering data on longevity of performance through a site survey. This will use the findings of the literature review and analysis above to:

- Design an approach for conducting a survey of a representative sample of households and insulation measures for site measurements of thermal performance;
- Propose a suitable approaches for measurement of thermal performance and degradation of insulation materials;
- Identify and provide recommendations of how previous retrofit schemes which to recruit homes across a range of time periods, and how this could ensure inclusion of a representative sample of poor installations.

Outputs

Phase 1 of this project will deliver the following key outputs for DESNZ:

- An **interim presentation** to DESNZ Energy Research Team on preliminary findings. Specifically addressing:
 - High-level summary of findings from literature and outline of available existing data and any available summary statistics;
 - High-level recommendations and design for a representative field survey measuring degradation and performance impacts of insulation measures up to 40 years after installation.
- A **literature review** to be published on .gov.uk covering:
 - Review of common insulation measures installed over the past 40 years;
 - Existing evidence landscape on degradation of insulation and performance impacts of degradation over time;
 - Review of existing case studies on poor installation, and a proposed classification for poor installations.
 - Performance gap issues in insulation retrofits.
- The **technical analysis report** containing summary of analysis on existing data including:
 - Summary of available data sources for tracking performance;
 - Statistical analysis of insulation performance from previous research and field trials where possible (sources such as National Energy Efficiency Data and previous Departmental research project data);
 - High-level plan for how identified data sources may be used to monitor performance of retrofits in buildings going forwards.
- The **field study sampling & methodology recommendations** will be produced to support the scoping of Phase 2.

The appointed contractor will be responsible for the day-to-day management of the project and hence responsible for achieving the project objectives.

Regular bi-weekly progress meetings will be held between the contractor and the DESNZ Project Manager with weekly email correspondence as a minimum. These meetings will be a chance to discuss progress against objectives, identify potential risks/opportunities and put in place actions such that risks are mitigated in a timely manner. The contractor will be required to maintain a risk register and RAID log which will be shared with the DESNZ PM and risks / issues will be escalated to the SRO.

As this work will be completed in two phases, all IP arising from Phase 1 must be made available to DESNZ to share with bidders and contractor appointed for future phases of the work – see T&C's.

Upon signing the contract the contractor will be required to nominate a named individual to act as the main point of contact for the project. The contractor will be asked to provide details of their project and organisational structure such that any issues with performance can be escalated appropriately by the Department to the appropriate level on the Contractor side.

7. Timetable

In their bid the bidder will be required to submit a breakdown of work packages and Gantt chart which outline a credible plan for completing the work.

We will ask for a presentation outlining preliminary findings midway through the project (in month 3 or 4) – this must be present a high-level summary of findings addressing each of the objectives to enable early-stage scoping and budgeting for Phase 2.

The duration of this Phase 1 of the project is expected to be 6 months.

Contract signed/kick-off meeting – August 2023

Preliminary findings presentation (payment milestone 1) – November 2023

Draft Final report (payment milestone 2) – end of January 2024

Final report submitted (payment milestone 3) – end of February 2024

Section 5 – Evaluation of Bids

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

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

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

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

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	SEL1.10	Information security requirements
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
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 the Contract Terms
Qualification	AW4.3	Contracts with suppliers from Russia or Belarus
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote 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 any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

Scoring criteria

Evaluation Justification Statement

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

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.3	Price	20%	20%
Technical	PROJ1.1	Understanding, Approach and Methodology	80%	20%
Technical	PROJ1.2	Understanding the Project Environment		20%
Technical	PROJ1.3	Ability to deliver, Expertise & Risk		30%
Technical	PROG1.4	Social Value - Fighting Climate Change MAC 4.1 – Achieving Net Zero		10%

Evaluation of criteria

Non-Commercial Elements

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

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

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

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

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the 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.

Evaluation process

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

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> ITQ logged upon opening in alignment with UK SBS's procurement procedures. Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to UK SBS, the Contracting Authority or the eSourcing Portal beyond the bidder control are responsible for late submission.
Compliance check	<ul style="list-style-type: none"> Check all Mandatory requirements are acceptable to the Contracting Authority. Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.
Scoring of the Bid	<ul style="list-style-type: none"> Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	<ul style="list-style-type: none"> The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.
Moderation meeting	<ul style="list-style-type: none"> To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the unsuccessful Bidders response
Due diligence of the Bid	<ul style="list-style-type: none"> the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> Submission of insurance documents from the Bidder Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder Taking up of Bidder references from the Bidders Customers. Financial Credit check for the Bidder
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> 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.

Section 6 – Evaluation Response Questionnaire

Bidders should note that the evaluation response 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

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

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date / time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the Section 3 of the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise the eSourcing portal prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the Jaggaer eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails.
- 7.10 Do complete all questions in the evaluation response questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

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

DO NOT

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

Some additional guidance notes

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

Phone 08000 698 632

Email 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/>

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Response Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UK SBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the Jaggaer eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.

- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Jaggaer eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.
- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the Jaggaer eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

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

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

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

USEFUL INFORMATION LINKS

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

8.0 Freedom of information

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

9.0. Timescales

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

10.0. The Contracting Authority's Contact Details

- 10.1 Unless stated otherwise in these Instructions or in writing from UK SBS 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 UK SBS contact.

- 10.2 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.

Appendix A – Glossary of Terms

TERM	MEANING
“UK SBS”	means UK Shared Business Services Ltd herein after referred to as UK SBS.
“Bid”, “Response”, “Submitted Bid”, or “ITQ Response”	means the Bidders formal offer in response to this Invitation to Quote
“Bidder(s)”	means the organisations being invited to respond to this Invitation to Quote
“Central Purchasing Body”	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
“Conditions of Bid”	means the terms and conditions set out in this ITQ relating to the submission of a Bid
“Contract”	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
“Contracting Bodies”	means the Contracting Authority and any other contracting authorities described in the Find a Tender Notice
“Contracting Authority”	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
“Customer”	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
“Due Diligence Information”	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
"EIR"	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
“Find a Tender”	Means the UK Government Portal that superseded the OJEU as from 1/1/2021 https://www.find-tender.service.gov.uk/Search
“FoIA”	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
“Invitation to Quote” or “ITQ”	means this Invitation to Quote documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. NOTE: This document is often referred to as an Invitation to Tender within other organisations
“Mandatory”	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
“Named Procurement person ”	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
“Order”	means an order for served by any Contracting Body on the Supplier

“Supplier(s)”	means the organisation(s) awarded the Contract
“Supplies / Services / Works”	means any supplies/services and supplies or works set out at within <u>Section [4] Specification</u>