



Invitation to submit a quote

in relation to market engagement consultancy services to support Use Case Development within the Citizen Wellbeing (Healthcare) 5G Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

Name of Customer: WM5G Limited

Issue date: 25 July 2019

Return date and time: midday (GMT) on 12 August 2019

Reference: D1083/DDA3/WP2

1	Introduction and background	3
2	Description of services	3
3	Evaluation process	3
4	Timetable	4
6	Contract details	5
7	External communications	5
8	Specific requirements	6
9	FOI and data protection	6
10	Evaluation criteria	6
11	Response checklist	8
	Appendix 1 – Specification	9
	Appendix 2 – Response	13

1 Introduction and background

- 1.1 WM5G Limited (the **Authority**) is issuing this invitation to submit a quote to parties interested in taking part in the procurement process for the appointment of a consultancy that will provide services to support market engagement activities relating to Use Case Development within the Citizen Wellbeing Testbed.
- 1.2 This procurement concerns the award of a contract for market engagement consultancy services to support Use Case Development within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands (the **Contract**) with the Authority.
- 1.3 This invitation to submit a quote contains important information regarding the intended procurement process for the Contract.
- 1.4 The Authority is a 'contracting authority' as defined in the Public Contracts Regulations 2015 (**PCR**). The funding envelope for this procurement is below the relevant OJEU levels and therefore this invitation to submit a quote is being undertaken outside the scope of the PCR.

2 Description of services

- 2.1 Details of the specification are set out at Appendix 1 below. The specification, which may be amended at the Authority's discretion, will form part of the Contract. All applicants should populate their response template (as set out at Appendix 2) based on the specification set out at Appendix 1.
- 2.2 All applicants are drawn to the provisions of the Transfer of Undertakings (Protection of Employment) Regulations 2006 (**TUPE**). It is the responsibility of applicants to procure their own advice as to whether or not TUPE applies to this procurement. Notwithstanding this, applicants should note that it is the view of the Authority that TUPE will not be applicable if this procurement exercise results in the Contract being awarded. Notwithstanding the foregoing, the Authority is not liable in any way for the opinion expressed above. If applicants have a contrary view to that stated above in relation to TUPE, applicants should notify the Authority of the same prior to the deadline to submit their response template.

3 Evaluation process

- 3.1 Responses to this invitation to submit a quote will be evaluated in accordance with the criteria set out at paragraph 10. Only responses that comply with this invitation to submit a quote will be evaluated.
- 3.2 Responses will be subject to an initial compliance check to ensure all relevant questions have been answered and all evidence has been included (where applicable). Where information is missing, an applicant may be rejected in which case its response will not be considered further. The Authority is under no obligation to clarify any missing information with an applicant unless, at its sole discretion, it considers it reasonable and appropriate to do so.
- 3.3 Following the initial compliance check, the Authority will evaluate the response in accordance with the evaluation criteria set out in paragraph 10.3.

4 Timetable

- 4.1 The following timetable is provided in guideline form only and is subject to change at the Authority's discretion:

Stage	Date(s)
Deadline to submit a response to this invitation to submit a quote	Midday on Monday 12 th August
Notification of contract award	Week commencing 19 August 2019
Contract go-live	Week commencing 26 August 2019

5 Instructions to applicants

- 5.1 Applicants must ensure that they submit a complete and accurate response to this invitation to submit a quote using the template set out in Appendix 2.
- 5.2 Applicants should answer all questions as accurately and concisely as possible. Answers should be clear and well-presented.
- 5.3 Responses and any additional sheets should be submitted as a PDF. All answers must be provided in the English language. Where the applicant wishes to submit translated documents, such documents must be certified translations.
- 5.4 At any time prior to the deadline for receipt of responses, the Authority may amend, add to or withdraw all or any part of this invitation to submit a quote. Any such amendments, additions, or removals will be notified to applicants via Contracts Finder.
- 5.5 **Responses, together with a copy of the applicant's most recent filed accounts, must be successfully submitted to the Authority by email to commercial@wm5g.org.uk by no later than midday (GMT) on 12 August 2019.** Please ensure that the email subject states 'Response to RFQ – D1083/DDA3/WP2'. Responses not received by the aforementioned deadline may not be considered by the Authority.
- 5.6 Any questions concerning this invitation to submit a quote should be submitted by email to commercial@wm5g.org.uk by no later than midday on 5 August 2019, quoting the reference 'D1083/DDA3/WP2' in the email subject. The Authority reserves the right not to respond to any questions or comments received after the deadline for clarification questions.
- 5.7 All responses must remain valid for a period of 90 days from the date of submission.
- 5.8 The Authority reserves the right to:
- 5.8.1 cancel or abandon this procurement exercise at any time at its entire discretion. The Authority accepts no liability for any losses caused by the cancellation or abandonment (or part thereof) of this procurement exercise nor any decision not to award the Contract; and/or

- 5.8.2 undertake further financial and/or technical due diligence against each applicant prior to entry into the Contract. Such due diligence may result in the Authority requesting that the applicant procures a parent company guarantee (where applicable) in favour of the Authority. Failure to provide to the Authority any information required for the purpose of undertaking this due diligence may lead to an applicant being eliminated from the procurement exercise; and/or
- 5.8.3 accept such part or parts of a tender as it decides, unless a tenderer expressly stipulates to the contrary at the time of submission of its initial tender.
- 5.9 The Authority reserves the right to disqualify any applicant if it becomes aware that the applicant did not qualify at the time of their response was submitted or that the applicant no longer qualifies, at any time before the formal entry into the Contract.
- 5.10 The Authority may require tenderers to demonstrate/present details or aspects of their tender submission to the Authority and their advisors for clarification purposes. Tenderers shall bear all costs and/or expenses incurred by tenderers associated with any such demonstration and/or presentation. Moreover, all applicants are responsible for all of their costs and expenses incurred in connection with this procurement process. Under no circumstances shall the Authority be liable for any costs or expenses borne by applicants.
- 5.11 No representation, warranty or undertaking, express or implied, is or will be given by the Authority or any of their agents or advisers with respect to the information contained in these instructions to applicants, including but not limited to with respect to its accuracy, adequacy or completeness.

6 Contract details

The successful tenderer will be required to enter in to the Contract for the services referred to in this document with the Authority. Further detail, including a draft or drafts of this Contract, will be provided following evaluation. The terms of the Contract will stipulate that the successful tenderer can raise an invoice on completion of the services/delivery of all the required deliverables.

7 External communications

- 7.1 Prior to entry into the Contract, applicants/tenderers must not, and must procure that its employees, officers, subcontractors, representatives, agents and/or advisors do not:
- 7.1.1 make any public statement or press release which is in any way connected to this procurement exercise or suggests/represents that there is a business relationship between the Authority and/or the applicant and/or tenderer; and
- 7.1.2 use any of the Authority's trademarks, logos or other intellectual property rights; and
- 7.1.3 undertake any action, or knowingly or negligently omit to do anything, which may bring the Authority into disrepute or embarrassment.
- 7.2 By submitting a response to this invitation to submit a quote, applicants acknowledge and agree to the restrictions set out at paragraph 7.1 above.

8 **Specific requirements**

Not applicable

9 **FOI and data protection**

FOI

9.1 Any information submitted to the Authority may need to be disclosed and/or published by the Authority pursuant to the Freedom of Information Act 2000. The Authority may disclose information in compliance with the Freedom of Information Act 2000, any other law, or, as a consequence of judicial order, or order by any court or tribunal.

9.2 If the applicant considers that any of the information included as part of their completed response is commercially sensitive then the applicant shall identify such part and explain what harm may result from disclosure and/or publication. Notwithstanding the foregoing, the Authority may still disclose such information where it is deemed necessary.

9.3 Submission by the applicant of any material marked 'confidential' or equivalent should not be taken to suggest that the Authority accept any duty of confidentiality by virtue of said marking.

9.4 The Authority reserves the right to publish its tender documents, contracts and data from invoices received and may, at its discretion, redact all or part of such information prior to publication.

Data Protection

9.5 The Contract will stipulate the respective roles of the Authority and the successful tenderer pursuant to the General Data Protection Regulation (2016/679) and Data Protection Act 2018. However, if the Authority is required to undertake a data protection impact assessment prior to award of the Contract, the applicant/tenderer may be required to support the Authority with such assessment.

10 **Evaluation criteria**

10.1 Responses will be subject to a two-stage evaluation process:

10.1.1 Stage 1 - Initial compliance check

10.1.2 Stage 2 - Suitability assessment

10.2 **Stage 1 - Initial compliance check**

10.2.1 Before responses are evaluated, the responses supplied will be subject to an initial compliance check to confirm:

(a) The response has been submitted on time, is completed correctly, is materially complete and meets the requirements of this invitation to submit a quote; and

(b) The response is sufficiently complete to enable it to be evaluated in accordance with this evaluation process.

10.2.2 Responses which do not satisfy paragraph 10.2 above may be rejected at this stage.

10.3 **Stage 2 - Suitability assessment**

10.3.1 Responses which successfully pass Stage 1 will be subject to an assessment in accordance with the evaluation criteria and weightings set out below. In the event that none of the responses are deemed satisfactory, the Authority reserves the right to consider alternative procurement options.

10.3.2 The evaluation is split into two parts as follows:

(a) Part 1 – Price; and

(b) Part 2 – Quality.

10.3.3 The weighting for the above is as follows:

(a) Part 1 – (40%); and

(b) Part 2 – (60%), divided into the following questions:

i Question 1 (20%) (2000 Words);

ii Question 2 (20%) (2000 Words); and

iii Question 3 (20%) (3000 Words).

10.3.4 Part 2 (questions 1 – 3) are qualitatively scored and the responses for each question will be marked with a score of 0 - 5 in accordance with the scale below:

5 – Excellent	meets all requirements set out, provides a detailed response and sound evidence. Response demonstrates a strong understanding of the requirements, for example.
4 – Good	meets all requirements and provides a detailed response but lacks some evidence in minor areas, for example.
3 – Adequate	meets most requirements, but lacks sufficient detail or evidence in some areas, for example.
2 – Minor concerns	meets some requirements but with insufficient detail or unexplained gaps in key areas, does not fully answer the question posed and/or causes some concerns regarding ability, skills and/or understanding, for example.
1 – Major concerns	meets very few requirements but with minor/no detail or unexplained gaps in several areas, does not answer the

	question posed at all/in detail and/or causes grave concerns regarding ability, skills and/or understanding, for example.
0 – Unacceptable response	no response received or the response fails to address the question in the intended way/does not meet the minimum requirements/is non-complaint/does not provide any information that demonstrates that the applicant has the ability, skills and/or understanding, for example.

10.4 Each member of the evaluation team will mark the responses to Part 2 (questions 1 – 3) individually and allocate scores. The scores for each question will be weighted in accordance with paragraph 10.3.3 above.

10.5 There are a total of 15 marks available for the scored questions. Once each score has been weighted in accordance with the percentage weightings, the weighted scores will be added together to identify the total score for that applicant.

10.6 Please note that any ancillary documents (such as PowerPoint slides or CVs) submitted with an applicant's response **will not** be reviewed or taken into consideration as part of the evaluation criteria. This paragraph does not however restrict applicants from responding to the qualitative questions set out in Appendix 2 on a separate sheet and providing this as an attachment as part of their response.

11 Response checklist

11.1 Applicants should review the table below before submitting the relevant documents via email to commercial@wm5g.org.uk. Please ensure that the email subject states 'Response to RFQ – D1083/DDA3/WP2':

Document	Mandatory or optional submission	Format of document	Required file name
Response	Mandatory	PDF	'001 Response – Applicant Name'
Most recent filed accounts	Mandatory	PDF	'002 Accounts – Applicant Name'

Appendix 1 – Specification

This section sets out WM5G Limited's (**WM5G**) requirement for services.

WM5G Introduction

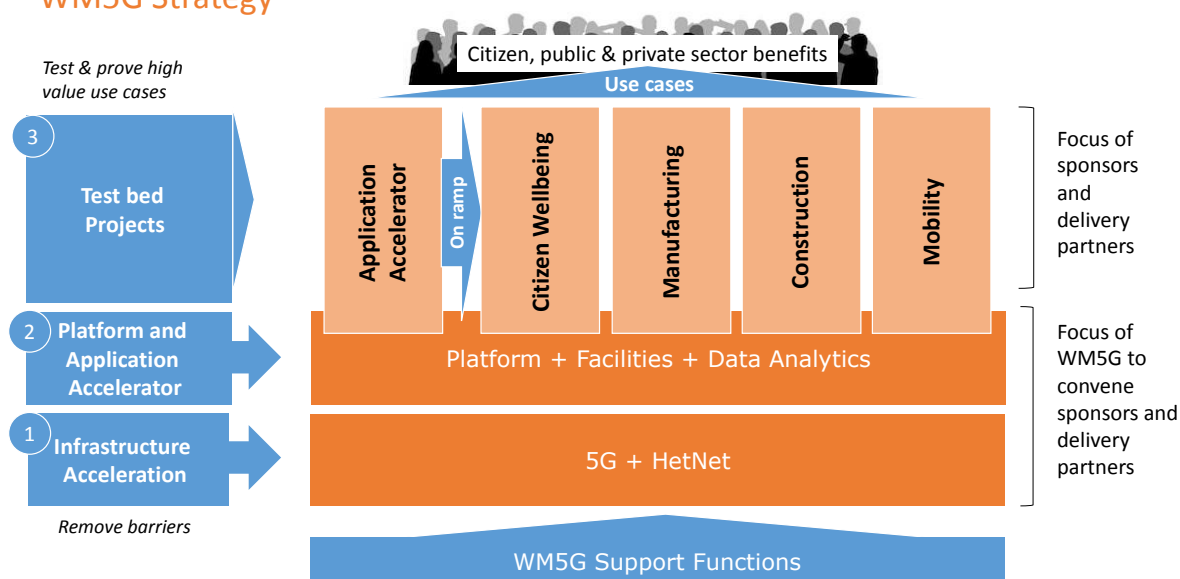
West Midlands Combined Authority (WMCA) successfully won the Department for Digital, Culture, Media & Sports (DCMS) competition to accelerate the roll out of 5G. This is an exciting project for the West Midlands region. WM5G is a new organisation, set up to deliver the strategy and further the aims of the WM5G Programme.

What is meant by '5G'? It is the next generation of mobile networks – significantly faster, reduced latency, greater reliability, flexible connectivity.

WM5G will be the UK's first region-wide 5G test bed, designed to achieve citizen, public and private sector benefits from 5G and hence accelerate 5G deployment across the region. WM5G is part of the DCMS 5G Test Beds and Trials Programme, which aims to accelerate deployment of 5G networks, ensure the UK can take early advantage of applications, maximise productivity and efficiency benefits to the UK from 5G, create new opportunities for UK businesses and encourage inward investment.

The diagram below outlines the strategy and scope of the programme:

WM5G Strategy



Urban Connected Communities background

The Urban Connected Communities (UCC) project is exploring how to deploy 5G effectively in an urban context, and the West Midlands was selected to run the largest and most ambitious of the UCC 5G trials. WM5G has established several vertical testbeds (projects) to focus on 5G delivery for these projects:

Infrastructure Acceleration	helping MNOs to deploy 5G in partnership with local authorities
Application Accelerator	helping end user organisation and technology companies to engage, explore and integrate with 5G and related technologies

Citizen Wellbeing Testbed	running use cases to support improved public service delivery for health, social care and the emergency services leading to improved efficiencies
Mobility testbed	use cases related to transport and travel in an urban environment
Manufacturing	use cases related to industrial processes and logistics
Construction	use cases covering construction design and build

The Citizen Wellbeing project has completed initial planning and is now commencing delivery activity. One of the first actions will be working with the University Hospitals Birmingham (UHB), the primary sponsor for Citizen Wellbeing, to identify and perform an initial assessment of the use cases to be delivered over the lifetime of the project and suppliers who may want to partner with Citizen Wellbeing to deliver the use cases, generating external visibility and encouraging engagement.

Market engagement

This document is a request for quotes to run the three work packages of market engagement for the Citizen Wellbeing testbed within WM5G. For completeness, the three work packages being sourced as separate procurements are:

1. Strategic data analysis
2. Use case development
3. Market engagement process

We would welcome bidders to provide responses covering any combination or all three work packages given the dependencies and information sharing potential. If one bidder intends to bid for all three opportunities then they need to submit three separate bids.

Scope of work: (WP2) Use Case Development

WM5G is seeking consultancy services to support market engagement activities relating to Use Case Development within the Citizen Wellbeing testbed. This will involve working with WM5G and staff at University Hospitals Birmingham (UHB) and their partners (e.g. Birmingham City Council, West Midlands Ambulance Service) including clinicians, information technology, informatics and other professionals to deliver a work package focused around the development of use cases. This second work package should interact with the first work package comprising of Strategic Data Analysis and will have synergies with a third work package on the Market Engagement Process.

The requirement for work package two is to undertake the development of a use case catalogue on the areas where 5G technology and applications can have a material impact (the areas of material impact will be identified and validated in work package one). A use case is typically focussed on technology (e.g. improved connectivity and applications through 5G), but it also must capture the high-level organisational changes required in relation to process and people to support the delivery of benefits for full implementation.

The use case catalogue development process will involve working with several organisations to define approximately 25 use cases to be considered for delivery. Each use case should relate back to the opportunities defined in work package one: Strategic Data Analysis.

The use case catalogue should contain enough detail for the testbed/workstream leadership team to decide on a short-list of use cases for the next phase of development. Our initial thoughts are that each use case in the catalogue would consider information around the following summary areas and we would welcome your ideas to further enhance the scope of this work and the proposed use case summary.

Use case summary

- Problem statement
- Root cause(s)
- Strategic solution
- Clinical sponsor leader and commercial owner
- Why 5G?
- Client/partner organisation(s)
- Who or where will this impact?
- What does success look like?
- Supplier organisations
- Stakeholders
- Consideration of options and initial financial estimate
- Comparable project examples

There may also be some benefit to including an initial view on the financial, commercial, and implementation factors (detailed below) to support the subsequent decision-making process.

The selected supplier will run the process through which the Investment Sub Committee / Expert Advisory Panel can make the decision on which use cases to be short-listed and prioritised for further development of functional and non-functional requirements. Our initial thoughts are that each short-listed use case would then be developed to consider information around the following areas. We would welcome your ideas to further enhance the scope of this work and the proposed financial & commercial, and implementation summary.

Financial & commercial

- Financial summary
- Sourcing considerations
- Market Opportunities
- Economic Impacts
- Approvals process

Implementation

- Project plan
- As-is & to-be mapping
- Process redesign requirements
- Existing systems and interface requirements
- Project exit arrangements
- IPR considerations
- Data governance
- Communications
- Key risks and assumptions

The output of this activity should enable a system integrator or application developer to commence with product development. Short-listed use cases which start within the first half of the programme

(approximately 3-5 use cases) are to be fully defined using the proposed areas and those in the second half of the programme are to be defined in outline. These latter use cases should be built on an incremental benefits case so that there is some flexibility in the approach to build on the lessons that will be learnt from the development and implementation of first set of case cases.

WM5G would also like to understand which suppliers are interested in partnering and match-funding to deliver the use cases. As part of the process of use case development, prospective suppliers for the delivery phase are to be noted, including: (a) existing products or products that are in the pipeline, which could be used to deliver a use case, (b) products that may not be of use for the use case catalogue, but may be used for future use cases (horizon scanning), and (c) their appetite to engage. Every use case in the use case catalogue should map to an entry in the supplier catalogue and indicate the potential prospective suppliers for use case / product delivery.

The team running work package two (Use Case Development) will need to work with the teams delivering work packages one and three (Strategic Data Analysis and Market Engagement Process, respectively) as there will be synergies across these areas. We think that work packages one, two and three could be run simultaneously as we anticipate there will be significant interaction and iteration between the teams. In your response, we would like to see how you will facilitate this.

WM5G requires a fixed price to deliver the requirements set out within the specification. Fixed prices should include any disbursements and expenses.

We envisage this work package to be priced at a maximum of £45,000.

Please provide your fixed price within the pricing area in Appendix 2. Within your returned response, please also provide a breakdown of how you arrived at your fixed price. The breakdown should include details of hourly rates and details of key personnel and hours allocated to the key milestones set out within the provided specification.

We welcome proposals for the best way to run this work package, and any ideas to enhance the scope of work.

Timeline

The timeline for this work is anticipated to be from the 27th August to 30th September 2019 (inclusive), by when all deliverables must have been received by WM5G for approval.

Location

We may be able to provide a hot desk (not bookable or guaranteed) in Birmingham in either WM5G's offices / our sponsors location but this should not be assumed. Your response to Part 2, Question 3 of Appendix 2 should identify how you will ensure this will not impact on the deliverables required.

Appendix 2 – Response

Dear WM5G Limited,

Invitation to submit a quote in relation to market engagement consultancy services to support Use Case Development within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

(Reference: D1083/DDA3/WP2)

We refer to your invitation to submit a quote in relation to market engagement consultancy services to support Use Case Development within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

Please find our response below.

Weightings:

Price (40%)

Quality (60%)

Response:

Part 1 - Fixed price (40%):

Name of applicant:	(Please complete)
Contact details of applicant:	(Please complete)
Confirmation of Fixed Price:	(Please complete), exclusive of VAT but inclusive of disbursements and expenses.
Breakdown:	(Please complete)

Part 2 - Response to quality (60%):

<p>Experience in Similar Projects (20%)</p> <p>Please demonstrate your experience of working on projects similar to the requirements set out within this request for quotation exercise. Within your response please provide specific examples of how you delivered the project and what the key outcomes were.</p>	<p>(Please complete)</p> <p>(Response should be limited to 2,000 words and an attachment is acceptable)</p>
<p>Ability to meet Timescales and Availability (20%)</p> <p>WM5G are working towards commencing on Tuesday 27th August 2019. Please can you provide confirmation of how you will work with us to achieve this milestone? Within your response please detail how soon you will be able to commence working with WM5G if you are successful and how you propose to work with up to another two external consultants (as referred to in the specification)?</p>	<p>(Please complete)</p> <p>(Response should be limited to 2,000 words and an attachment is acceptable)</p>
<p>Alignment with the requirements detailed in this document (20%)</p> <ul style="list-style-type: none"> • Please provide a comprehensive methodology and a detailed plan showing how the work activities will be delivered, along with how you intend to effectively manage the various stakeholder groups (e.g. WM5G, UHB, other) to get buy-in for this work. • Please provide details of how you could potentially enhance delivery beyond the specification in Appendix 1? • Please provide details of who will be working on this project if successful and details of their relevant experience? • Please confirm your proposed working arrangements in terms of your team's location? 	<p>(Please complete)</p> <p>(Response should be limited to 3,000 words and an attachment is acceptable)</p>

We also attach a copy of our most recent filed accounts as a PDF.

This response remains valid for a period of 90 days from the date stated above.

Yours faithfully

For and on behalf of:

Name of applicant:

Address of applicant:

Date: