

Invitation to Quote



Department for Energy Security & Net Zero

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

Subject: Developing RdSAP10 Code for the NBM

Sourcing Reference Number: PS24141

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PS24141 Short Form Contract - Data Sharing Agreement (Annex 6)

****The winning supplier will be required to sign a Data Sharing Agreement to access the anonymised data, agreeing to compliance with data protection legislation and maintaining the security of the EHS dataset****

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 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.

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

Our Customers

DSIT, DESNZ

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>

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 Energy Security & Net Zero (DESNZ)

You can contact the Data Protection Officer at:

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

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 (DESNZ) 3-8 Whitehall Place, London, SW1A 2AW |
| 3.2. | Buyer name | Kallista Thomas |
| 3.3. | Buyer contact details | Professionalservices@uksbs.co.uk |
| 3.4. | Maximum 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 eSourcing portal. Guidance on how to obtain support on using the 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 | | |
|------------------------|--|--|
| 3.5. | Date of Issue of Contract Advert on Contracts Finder | Monday, 19 August 2024 Contracts Finder |
| 3.6. | Latest date / time ITQ clarification questions shall be received through the eSourcing Portal | Wednesday, 28 August 2024 11.00 |
| 3.7. | Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal | Friday, 30 August 2024 |
| 3.8. | Latest date and time ITQ Bid shall be submitted through the J eSourcing Portal (the Deadline) | Friday, 06 September 2024 11.00 |
| 3.9. | Anticipated notification date of successful and unsuccessful Bids | Thursday, 19 September 2024 |
| 3.10. | Anticipated Contract Award date | Wednesday, 25 September 2024 |
| 3.11. | Anticipated Contract Start date | Monday, 30 September 2024 |
| 3.12. | Anticipated Contract End date | Friday, 31 January 2025 |
| 3.13. | Bid Validity Period | 90 Days |
| 3.14. | Anticipated Contracts Finder notice and redacted contract publication if applicable. | 30 days upon award |

Section 4 – Specification

1. Background

The Standard Assessment Procedure (SAP) and Reduced data SAP (RdSAP) are the Government's approved methodologies for assessing building energy performance and producing Energy Performance Certificates (EPCs). SAP is used in the assessment of new dwellings, whilst RdSAP is a simpler and lower cost method for assessing existing dwellings.

The SAP and RdSAP methodologies are used to estimate energy use in dwellings (assuming standard occupancies and energy use patterns) and to calculate associated energy performance metrics. The main metrics are the SAP rating (also known as the Energy Efficiency Rating (EER)) which reflects the cost of the energy use and the Environmental Impact Rating (EIR) which reflects carbon emissions. Both the EER and EIR are expressed on scales of 1 to 100, with higher numbers representing lower running costs or emissions, respectively. On EPCs, a dwelling's EER and EIR ratings are converted into one of seven bands (A-G), with band A capturing the best performing dwellings on cost or emissions, and band G the worst. Further information on the SAP and RdSAP methodologies can be found on the Building Research Establishment (BRE) website here: <https://bregroup.com/expertise/energy/sap>.

The Government has objectives on improving the energy performance of domestic properties based on the EER metric from SAP/RdSAP. For example, the Government has set as an aspiration that as many homes as possible achieve EPC Band C by 2035 (which corresponds to properties having an EER of 69 or more). In addition, many existing Government policies make use of the EER metric to determine eligibility and measure property improvements.

To model the impact of Government policies that retrofit existing homes with energy efficiency measures and clean heat systems, DESNZ analysts use our in-house National Buildings Model (NBM). The NBM is a microsimulation of buildings in England, based on a building stock dataset that represents the diversity of buildings across the country. The stock dataset is derived from the [English Housing Survey](#), which is a weighted sample survey that collects detailed information on buildings, including information necessary to enable calculation of dwelling energy use / energy performance through an RdSAP-consistent energy calculator. Note that the NBM is coded in Python, allowing users to write their own scenarios to model policies and policy interactions.

Both SAP and RdSAP are periodically updated to enable more accurate and reliable assessments of properties. Since June 2022, [SAP10.2](#) has been the approved version of SAP used in the assessment of new dwellings. In the summer of 2024, [RdSAP10](#) will replace the existing RdSAP2012 as the approved methodology for assessing existing dwellings. To align with this change, DESNZ requires a version of the NBM energy calculator that is consistent with RdSAP10. This will allow more accurate modelling of Government policies that rely on the EER metric / EPC Bands going forward. Please be aware that the EHS data and NBM model are proprietary models to DESNZ and the project will need to be coded on a government-issued laptop.

2. Aims and Objectives of the Project

The overall aim of this project is to have a new RdSAP10-consistent energy calculator coded into the NBM. This should enable the calculation of EER and EIR scores for dwellings in the NBM, based on RdSAP10, and for the re-scoring of dwellings when building features are changed (e.g., walls are insulated or the heating system changed). The RdSAP10-consistent calculator should be implemented into the NBM such that the model can seamlessly switch between assessing dwellings with RdSAP2012 (as done now) and assessing dwellings with RdSAP10. However it may be necessary to update the dataset where RdSAP10 combines fields that RdSAP2012 does not.

In the NBM, information on dwellings in the model (the model uses a sample of approximately 12,000 dwellings) is stored in a series of CSV files which are read in and converted into nested python dictionaries. These dictionaries are then passed to a variety of functions which perform different tasks which can approximate the effects of various policies or calculate additional information on the dwellings. Some of these functions work by modifying the values in, or adding fields to, the original dictionaries, for example to simulate improvements made to a dwelling under a specific policy.

The relevant functions here are those which implement the SAP calculation using the RdSAP methodology (currently based on RdSAP2012). These functions first apply the RdSAP10 defaults (for example assumed levels of wall or loft insulation based on dwelling age and type), adding or modifying values in the input dictionaries before extracting that information and using it to run each step of the SAP calculation to calculate the EER and EIR for a dwelling. The functions finally return a dictionary which contains all parameters (with the key including the parameter number as taken from SAP and a description of what the value is) that are input into the calculation and all those calculated at each step of the process so that they can be interrogated by users.

Coding a new RdSAP10-consistent energy calculator into the NBM will mean creating a new function that takes in these dictionaries containing the dwelling information and reproduces this process using the SAP10/RdSAP10 methodology and defaults to estimate energy use, from which EER and EIR scores can then be calculated.

DESNZ will be responsible for updating the stock in the model if it is required. This project is only intended to create the calculator.

The successful applicant will need to have access to anonymised EHS data and NBM building stock, this will require the signing of a data sharing agreement. These will largely be used to bug check the calculator after the model dwellings have been signed off. You will not be allowed to share the underlying data, or any data derived from them without approval from a data sharing perspective.

3. Suggested Methodology

The successful bidder will need to familiarise themselves with the RdSAP10 methodology and how it would be applied in the NBM, and the differences between RdSAP10 and RdSAP2012. They will then have to write the appropriate Python code to enable the NBM to produce RdSAP10-consistent EPCs for all types of housing within the NBM's database, as far as this is possible – it may require modifications to the stock as the existing RdSAP2012 code aggregates some data that RdSAP10 does not.

The end result will also have to be signed off by DESNZ analysts. Please be aware that as the 2017 EHS dataset behind the NBM is considered proprietary information, the project will have to be coded on a government issued laptop. **The supplier will be required to sign a Data Sharing Agreement to access the anonymised data, agreeing to**

compliance with data protection legislation and maintaining the security of the EHS dataset.

Suppliers should include a Quality Assurance (QA) plan that they will apply to all the research tasks and modelling. This QA plan should be no longer than 2 sides of A4 paper. It should include the delivery of a DESNZ QA Log.

[This link](#) contains an externally accessible version of the DESNZ Modelling QA guidance, and the QA log: The QA log should be filled during the project and submitted at project completion as a deliverable to demonstrate the QA undertaken.

When the calculator is submitted to DESNZ, during the project or at completion, it should be accompanied by confirmation by a senior (partner or equivalent) of the contracting organisation, that the assurance has taken place in accordance with approaches outlined in the QA plan agreed with DESNZ. Evidence of testing through development provided in support of the QA Log ratings greatly improves the level of confidence in it.

For all projects suppliers must supply quality assurance evidence for any existing models they wish to submit to DESNZ. This must be:

- to a standard that is at least the equivalent of DESNZ's internal standard, available at [this link](#)
- accepted as suitable by DESNZ

4. Deliverables

The main project deliverable is an RdSAP10-consistent energy calculator coded into the NBM that allows for the determination of dwelling EER and EIR scores in line with the RdSAP10 methodology.

Additional project deliverables will be:

- Documentation on the RdSAP10 energy calculator, including a model report, user guide, assumptions log, QA log and appropriate annotations of code.
- A presentation to explain the differences between RdSAP10 and RdSAP2012 and how it will change our analytical outputs. In addition it should show how to use the new code.

Please provide details of your proposed project plan and timescales, ensuring the project deliverables outlined in the specification are met.

Terms and Conditions

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

Section 5 – Evaluation of Bids

The evaluation model below shall be used for this 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 UKSBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

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

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

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

| Pass / Fail criteria | | |
|----------------------|---|---|
| Evaluation Envelope | Q No. | Question subject |
| Qualification | 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 | PPN 01/22 - 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 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 | AW5.1 | Price | 20% | 20% |
| Technical | PROJ1.1 | Approach / Methodology | 80% | 40% |
| Technical | PROJ1.2 | Ability to deliver | | 10% |
| Technical | PROJ1.3 | Understanding the Project Environment | | 10% |
| Technical | PROJ1.4 | Project and Risk Management | | 10% |
| Technical | PROJ1.5 | Social Value | | 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.

The lowest score possible is 0.

The scores achieved for the Non Commercial and Commercial Criteria will be combined to give a bidders total score and ranking.

Award criteria in the event of a tied place for an award decision

If as a result of the application of the aforementioned scored criteria applicable to Commercial and Non Commercial has been undertaken and suitable due diligence has occurred to ratify this position, this then results in a tied place re more than one supplier has attained a score that is equal to another bidder under this procurement procedures due process, then the Contracting Authority shall make an award decision on the basis of the bidder who provided a bid that attained the highest score under Commercial criteria.

For example:

Bidder A scores 12.50 for Commercial and 45.00 for Non-Commercial

Bidder B scores 15.10 for Commercial and 42.40 for Non-Commercial

The result is a tied place at score of 57.50

The Contracting Authority stated in its procurement documents that the bidder who scored the highest on under Commercial criteria in a tied place, shall be awarded the contract therefore Bidder B wins the award.

This evaluation criteria will therefore not be subject to any averaging.

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 UKSBS's procurement procedures. Any ITQ 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. |
| 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 (if required to reach an award decision) | <ul style="list-style-type: none"> To review the outcomes of the Commercial review To agree final scoring for each Bid, relative rankings of the Bids 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 **eSourcing Portal**.

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

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

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

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

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date / time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the Section 3 of the 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 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 UKSBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UKSBS staff or the Contracting Authority 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 UKSBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed page limits, the additional pages will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via the eSourcing portal. Responses received by any other method than requested will not be considered for the opportunity.

Some additional guidance notes

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

Phone 08000 698 632

Email customersupport@jaggaer.com

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

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

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Response Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this 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 eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliance checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliance 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 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), UKSBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UKSBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including 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 UKSBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this 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 UKSBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this

procurement must be directed through the eSourcing tool to the designated UKSBS contact.

- 10.2 Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Response outside of the eSourcing portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all bidders as to how to submit your Response. Failure to follow this requirement will result in disqualification of the Response.

Appendix A – Glossary of Terms

| TERM | MEANING |
|--|---|
| “UKSBS” | means UK Shared Business Services Ltd herein after referred to as UKSBS. |
| “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 Contracts Finder Contract 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 |
| “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 UKSBS 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 Section [4] Specification |