

Standard Selection Questionnaire (SSQ) Project Brief – Digital Partners Framework

SSQ/ITT/Contract information:

Route to Market: Restricted Procedure

Expected commencement date: 7th February 2025

Contract length: 3 years with the option to extend for 1 additional year (3+1 years)

Contract form: Framework

Use of the Framework: Mini Competition or Direct Award, exclusive to The Crown Estate only.

ITT Documents: To follow upon conclusion of the SSQ

Introduction

By a Contract Notice placed in the Find a Tender Service (FaTS) (the Contract Notice) and a Contracts Finder notice, The Crown Estate invites tenders from suitably qualified and experienced Suppliers to provide various Services for The Crown Estate – Digital Partners Framework (the Project).

This is a Restricted Procedure conducted in accordance with the Public Contracts Regulations 2015 (SI 2015/102) (as amended) (the Regulations).

The Crown Estate invites Suppliers to submit SSQ responses for the Services for the Project as detailed in this SSQ Project Brief, which comprises the following documents:

Sections within this SSQ

1. Background to this SSQ
2. Responding to the SSQ
3. SSQ Evaluation
4. Indicative SSQ Timeline
5. Portal
6. Communications Protocol
7. Consortia
8. Sub-contracting
9. Confidentiality
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1. Background to this SSQ

The Crown Estate is embarking on a two stage (Restricted) tender to award a Framework Agreement for up to eleven Digital Partners with Digital and Data Resource capabilities across three 'Lots'. The Digital Partners Framework Agreement will support the Digital Team in delivering initiatives across the Enterprise, to address high resource demand, drive efficiencies and value, in alignment with the public procurement regulations. The key priority is to accelerate the delivery of digital services across our Marine, Urban and Windsor Strategic Business Units. The Standard Selection Questionnaire (SSQ) commences that two-stage tendering process.

What are we looking for? An agreed framework with Suppliers to provide resource skill set capabilities covering but not limited to: Portfolio & Projects Management, Product Management, Business Analysis, Scrum Masters, Enterprise Architecture, Data & Analytics, Platform Engineering, Software Engineering, DevOps, Systems Administration, Testers, Systems, ITIL Service Management, Cyber Security, User Research and Experience. The selected Suppliers will provide resources in the form of Teams, Squads and embed individuals to support our Data and Analytics Management, Product and Delivery, Cyber Security, Emerging Technology, and Operations Teams.

The Digital Partners Framework shall align value for money in running a more efficient delivery approach across the Enterprise. Focus on building knowledge sharing relationships with delivery partners in the process of supplying specialist resources and digital outcomes.

This two stage (Restricted) tender adopts a 'Lots' approach.

Lot 1: Managed Digital Resources (Covering skilled resources to support current & future needs).

Award up to 3 Suppliers to provide a comprehensive suite of digital resources that encompasses the essential skill set to support Project management methodologies, Product lifecycle management, and Service Delivery Excellence. The resources acquired will facilitate the development, enhancement, and execution of initiatives within the portfolio, focusing on optimising performance, fostering innovation, and ensuring customer satisfaction.

Lot 2: Data & Analytics (Covering Data Management & Governance, Data Science & Analytics, Geospatial Data, Data Engineering and Tools)

Award up to 5 partners to provide both thought leadership and skilled resource to enhance our existing data capabilities, manage products and service delivery and support our Data Transformation Programme across Data Management & Governance, Data Science & Analytics, Geospatial Data and Data Engineering using advanced modern cloud native tools.

Lot 3: Smart Products and Innovation (Covering Generative AI, Quantum, and Machine Learning)

Award up to 3 Suppliers to provide Domain specialist in Emerging Technology running Incubation hub and transforming into delivery. Through this lot, we seek to enhance the ability to rapidly explore and validate innovative solutions through agile, cost-effective Proof of Concepts (POCs), with an initial focus on Artificial Intelligence (AI). While the initial focus is on AI-driven POCs, this will also cover other emerging technologies where relevant. The aim is to build internal innovation

capabilities by collaborating with teams, leveraging existing technologies, and ensuring effective knowledge transfer and inform strategic decision making.

2. Responding to the SSQ

- 2.1 Suppliers are required to respond to the SSQ through the Portal. The SSQ contains a set of mandatory screening and project specific questions to determine Supplier suitability for the ITT (Invitation to Tender) stage.
- 2.2 Suppliers are invited to respond to any number of the 3 Lots.
- 2.3 There shall be a clarification window for suppliers to ask clarification questions regarding the SSQ, please see the 'SSQ Indicative Timetable' for specific dates. All questions should be communicated via the Portal, see 'Communications Protocol' for full details.
- 2.4 The specific type of services will be specified further at ITT stage.

3. SSQ Evaluation

The evaluation will comprise of two stages, which are numbered in order below:

- 1. Firstly, the standard SSQ questions which will be assessed on a pass/fail basis, based on whether the correct and complete information has been provided. **Should Suppliers fail on any of the standard questions, they will be excluded.**
- 2. Secondly, against each Lot, suppliers' capabilities and experience will be assessed on a pass/fail basis against the criteria set out. **Should Suppliers fail to meet the minimum criteria set out, they will be excluded from that Lot.**

4. Indicative SSQ Timeline

Timeline for SSQ process to ITT, this is indicative only. The full procurement timeline will be outlined in the ITT documentation.

| Activity | Dates |
|--|---|
| Publication of SSQ / Find a Tender Notice/ Contracts Finder Notice | 7 th February 2025 |
| Clarification Question Deadline | 21 st February 2025 |
| The Crown Estate to issue responses to all clarification questions raised by the Question Deadline | 28 th February 2025 |
| Submission of Supplier Responses to SSQ | 10 th March 2025 by 12:00 midday |
| Review of SSQ responses to be completed | 20 th March 2025 |
| Suppliers to be notified if they will be invited to the ITT | 21 st March 2025 |
| Publication of ITT/ Find a Tender Notice/ Contracts Finder Notice | 24 th March 2025 |

5. Portal

- 5.1 All tender documents will be made available via the Tender Portal.
- 5.2 Suppliers are instructed not to include in their response anything other than the requested documents. Marketing material will be discarded and will not be read.
- 5.3 Suppliers are required to submit their completed Tenders through the Tender Portal. Suppliers are advised to complete their Tenders in advance of the Submission Deadline to allow time to understand and incorporate the responses to any clarifications that have been requested. It is the responsibility of Suppliers to ensure they are familiar with the system and allow sufficient time for finalising and submitting their Tenders.
- 5.4 The Crown Estate is not responsible for inaccurate or incomplete contact information input into the Tender Portal by Suppliers. It is the responsibility of a Supplier to ensure that the contact information they have entered for their organisation on the Tender Portal is accurate and kept up to date. Important notification messages relevant to this procurement may not be received by a Supplier should the contact information be inaccurate. If at any stage a Supplier needs to update the contact information held for their organisation this can be achieved by submitting it via the Tender Portal. The Crown Estate is under no obligation to respond/follow up on 'out of the office' responses received from a Supplier and so Suppliers will need to make appropriate arrangements to

deal with absences. For any technical advice or assistance relating to the Tender Portal if for any reason the Tender Portal is not available, please contact the Tender Portal helpdesk between 8.00am and 6.00pm Monday to Friday on 0800 069 8620 (or +442036084013 if outside the UK) or email [help@SourceDogg.com]. This email address should only be used where there are technical issues with the Tender Portal. Otherwise, all questions and queries relating to this procurement should be submitted via the Tender Portal.

- 5.5 The Supplier is not permitted to return by email, or by any means other than via the Tender Portal, any part of the Tender. Any attempt to email, or return otherwise than via the Tender Portal, any part of the Tender may result in the Tender being excluded.
- 5.6 All Tenders must be submitted via the Tender Portal by the Submission Deadline unless alternative tender submission instructions are stated. Suppliers are advised to allow plenty of time to submit their completed Tenders onto the Tender Portal as this will take some time to complete and The Crown Estate will not accept any documents, including any completed Tenders that are submitted after the Deadline.
- 5.7 All Forms of Tender must remain valid and open for acceptance by The Crown Estate for a period of ninety (90) calendar days from the Submission Deadline.

6. Communications Protocol

- 6.1 During the Tender period, a Supplier is able to submit clarification questions through the Messages feature within the Tender Portal. This should be used for all queries and requests for clarification regarding the procurement as it provides an effective and auditable trail. A Supplier's queries will be secure and cannot be seen by any other Suppliers. The Crown Estate will publish the questions and the response, in a suitably anonymous form, via the Messages feature to all Suppliers before the closing date for the submission of Tenders.
- 6.2 Any questions about this procurement should be submitted in writing via the Tender Portal. The Crown Estate will endeavour to answer all queries about the procurement provided that such queries are received at least six (6) working days before the closing date for receipt of Tenders. Suppliers must clearly indicate, when submitting a question, which (if any) part of their question they view as confidential and applicable only to the Supplier submitting the question. If The Crown Estate does not agree that the question is confidential and applicable only to the Supplier, the Supplier will be given an opportunity to withdraw the question within two (2) days. If the question is not withdrawn by the Supplier, The Crown Estate may publish the question and response.
- 6.3 Any communication or attempt to contact any member of The Crown Estate's staff and/or officers, may result in your organisation being excluded from the procurement process and not considered further.
- 6.4 All information about this procurement will be made freely available to Suppliers via the Tender Portal. Suppliers should check the Tender Portal regularly for any updated information relating to the procurement.

- 6.5 The Crown Estate may have clarifications that they wish to raise with the individual Suppliers during the tender process. These will be raised by The Crown Estate, in writing, to the individual Suppliers via the Messages feature in the Tender Portal.

7. Consortia

- 7.1 Where a consortium is proposed, all members of the consortium will be required to provide the information required in all sections of the ITT as part of a single composite response. Responses must enable The Crown Estate to assess the overall provision of Services proposed. The evaluation will take place on the information from the Lead Member.
- 7.2 Where the Lead Member is a special purpose vehicle or holding company, information should be provided of the extent to which it will call upon the resources and expertise of its members.
- 7.3 Where a consortium or other grouping of economic operators is proposed each member of the consortium (or grouping) shall provide a written undertaking addressed to The Crown Estate that it, together with the other members, shall make available to the consortium (or grouping) the resources necessary to perform the contract. Where such an undertaking is not received the Tender shall be considered failed and excluded from further consideration.
- 7.4 The Crown Estate recognises that arrangements in relation to the consortia may be subject to future change. Suppliers should therefore respond in the light of such arrangements as are currently envisaged. Suppliers are reminded that The Crown Estate must be immediately notified of any changes, or proposed changes, in relation to the bidding model so that a further assessment can be carried out by applying the selection criteria to the new information provided. Any change in consortium membership may lead to subsequent exclusion from the tender process. The Crown Estate also reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of any updated information supplied. Such assessment being carried out in line with the evaluation criteria and methodology identified.
- 7.5 Where Suppliers are proposing to create a separate legal entity, such as a special purpose vehicle, Suppliers should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity.

8. Sub-contracting

- 8.1 Where the Supplier proposes to use one (1) or more sub-contractors to deliver some or all of the contract requirements, they should provide details of the proposed bidding model that includes members of the supply chain and the percentage of work proposed to be delivered by each sub-contractor.
- 8.2 The Crown Estate recognises that arrangements in relation to sub-contracting may be subject to future change and may not be finalised until a later date. However, Suppliers should be aware that where information provided to The Crown Estate indicates that sub-contractors are to play a significant role in delivery, any changes to those sub-contracting arrangements may affect the ability of the Supplier to proceed with the procurement

process or to provide the supplies and/or Services required. Suppliers should therefore notify The Crown Estate immediately of any change in the proposed sub-contractor arrangements. The Crown Estate reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of the updated information. Such assessment to be done in line with the Evaluation Criteria and Methodology as laid out.

9. Confidentiality

- 9.1 Suppliers may only make use of any information provided by The Crown Estate relating to or in connection with this procurement for the purposes of preparing and submitting their Tender. Suppliers shall not, without the prior written consent of The Crown Estate, at any time make use of such information for any other purpose or disclose such information to any person, except:
- a) where the disclosure is required by law or any court, regulatory or government authority competent to require the same;
 - b) to the extent where such information is brought within the public domain otherwise than by the breach of this paragraph 9.1 by the relevant Supplier; or
 - c) where such information is disclosed for the purposes of obtaining sign-off from insurers and legal advisers on the Contract, or for obtaining sureties, guarantees or commitments from proposed sub-contractors or suppliers and other information required to be submitted with their Tender.
- 9.2 Suppliers must treat this SSQ (and all the documents forming part of or appended or scheduled to this ITT) and all other information provided by or on behalf of The Crown Estate as private and confidential (and shall procure that their employees, consultants, subcontractors, advisers, insurers and funders shall treat documentation supplied in relation to this ITT as confidential). No Supplier shall disclose that it has been invited to submit a Tender to The Crown Estate or release details of this ITT (and all the documents forming part of or appended or scheduled to this ITT) other than on a strictly confidential basis and to the extent strictly necessary to such parties as the Supplier needs to consult in order to submit a Tender.
- 9.3 Suppliers shall not at any time release any information concerning the ITT and/or their Tender and/or any related documents and/or discussion with The Crown Estate in connection to this procurement for publication in the press or on radio, television, screen or any other medium.
- 9.4 This ITT is issued in confidence and remains the property of The Crown Estate. The copyright in this ITT is vested in The Crown Estate and may not be reproduced, copied or stored on any medium without the prior consent of The Crown Estate except in relation to the preparation of the Tender.

10 Conflicts of interest

- 10.1 The Crown Estate may exclude any Supplier if there is an actual and/or potential conflict of interest which cannot be effectively remedied. The concept of a conflict of interest as set out in Regulation 24 of the Regulations, includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
- 10.2 Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform The Crown Estate and provide details of the actual or potential conflict(s) and any measures taken or to be taken to remedy the actual or potential conflict(s).

11 Freedom of Information

- 11.1 Suppliers are to note that The Crown Estate is subject to the Freedom of Information Act 2000 (the FOIA) and the Environmental Information Regulations 2004 (the EIR). Under the FOIA and EIR, members of the public or any interested party may make a request for information held by The Crown Estate at the time of the request.
- 11.2 Following such a request, The Crown Estate will consider the disclosure of any relevant information, including price quotes, contained in Tenders both successful and unsuccessful, subject to the exemptions of the FOIA or EIR as applicable. Suppliers should be aware that attaching a blanket label of 'private and confidential', 'commercially confidential' or similar to Tenders may not exempt those Tenders from disclosure under the FOIA/EIR.
- 11.3 If a Supplier considers that all or any part of its Tender and/or any specific information contained therein constitute a "trade secret", or that the Tender or information is commercially sensitive information disclosure of which would be likely to prejudice the commercial interests of any party, believes that a duty of confidentiality applies or otherwise considers that such documents and/or information falls within any other exemption set out in the FOIA/EIR, the Supplier should:
- a) attach information it considers to be commercially sensitive e.g. costing or trade secrets in a separate Annex 4 Schedule of Confidential Information marked 'commercially sensitive information' or 'trade secret' and include a time limit for the sensitivity of the information; and
 - b) in respect of such schedule and/or specific information, identify the particular exemption that the Supplier considers should apply in the particular circumstances.
- 11.4 For the avoidance of doubt, Annex 4 of this ITT is a mandatory document which must be submitted to the Tender Portal. If a Supplier considers that its Tender and/or specific information contained therein does not constitute a "trade secret" or commercially sensitive information as described at paragraph 2.54 above, the Supplier is still required to submit Annex 4 and will need to mark table 2 as "not applicable".

- 11.5 Suppliers should be aware that, even when they have identified relevant documents and/or information and considered an exemption applies in a completed version of the Annex 4 Schedule of Confidential Information of these Instructions, The Crown Estate will have sole discretion in deciding whether such documents and/or information should be disclosed under the FOIA/EIR.

12 Final decision and Approval

- 12.1 The Crown Estate reserves the right to clarify a Supplier's SSQ response at any point during the evaluation process and will do this by communicating with the Supplier concerned via the Tender Portal.
- 12.2 The Suppliers acknowledge and agree that the requirements set out in the SSQ continue to apply throughout the Procurement and, if successful, into the Contract duration. With that in mind, prior to contract award and prior to entering into the Contracts (and at any other reasonable time throughout the Procurement), The Crown Estate reserves the right to request any information from a Supplier to ensure its continued compliance with the SSQ criteria, including (but not limited to) evidence of the Supplier's economic and financial standing.