

# Invitation to Quote



## Department for Energy Security & Net Zero

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

**Subject: Time of Use Tariff - Consultancy Procurement**

**Sourcing Reference Number: PS23417**

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

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

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

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

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

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

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

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

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

### **Privacy Statement**

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

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

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

<https://www.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](mailto:casework@ico.org.uk)

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

### **Contact Details**

The data controller for your personal data is:

Department for Energy Security and Net Zero (DESNZ)

You can contact the Data Protection Officer at:

DESNZ Data Protection Officer, Department for Energy Security and Net Zero  
1 Victoria Street, London, SW1H 0ET. Email: [dataprotection@energysecurity.gov.uk](mailto: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 1 Victoria Street, London, SW1H 0ET
3.2.	Buyer name	Robin Davis
3.3.	Buyer contact details	<a href="mailto:professionalservices@uksbs.co.uk">professionalservices@uksbs.co.uk</a>
3.4.	Maximum value of the Opportunity	£50,000.00 Excluding VAT
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25. 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.</b>

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Find a Tender	Friday, 22 <sup>nd</sup> December 2023
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Friday, 5 <sup>th</sup> January 2024 @ 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Tuesday, 9 <sup>th</sup> January 2023
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal ( <b>the Deadline</b> )	Wednesday, 17 <sup>th</sup> January 2024 @ 11.00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday, 24 <sup>th</sup> January 2024
3.11.	Anticipated Contract Award date	Friday, 26 <sup>th</sup> January 2024
3.12.	Anticipated Contract Start date	Monday, 29 <sup>th</sup> January 2024
3.13.	Anticipated Contract End date	Friday, 31 <sup>st</sup> April 2024
3.14.	Bid Validity Period	90 Days
3.15.	Anticipated Contracts Finder notice and redacted contract publication if applicable.	Within 30 days of award

## Section 4 – Specification

### 1. Purpose of document

This document sets out the requirements for external technical expertise on stakeholder engagement on preferred options for exchanging interoperable energy tariff information. As per the “Delivering a smart and secure electricity system: the interoperability and cyber security of energy smart appliances and remote load control” consultation<sup>1</sup>, appliances like electric vehicle charge points and heat pumps have high potential to provide flexibility through Demand Side Response (DSR). While they will increase demand for electricity, these appliances and others can deliver DSR by changing when electricity is used or produced, to minimise their impact on the energy system. As markets for such appliances continue to grow, new business models and services will emerge whereby companies remotely manage consumers’ energy smart appliances according to consumer preferences, to reduce impact on the energy system and subsequently reduce consumer bills. In addition, appliances will be able to optimise energy usage, while also ensuring consumers’ needs are met. For example, an electric vehicle smart charge point can be programmed to ensure that a consumer’s car is charged when they need it, but it can also optimise when the car charges to minimise the energy system impact. This will allow DSR to be delivered ‘behind the scenes’ for consumers, ensuring they still get the same or better service but at lower costs and while retaining choice and control.

We are seeing some of these services coming to market now. For example, EV owners can subscribe to services where they get discounts, rewards or cash-back for letting a third party dynamically control when their car is charged. Some energy suppliers are offering sophisticated time-of-use tariffs that change the price of energy depending on when it is used. Whilst these services are not being offered on a large scale now, the scale of uptake in DSR and ESAs by domestic and small non-domestic consumers has the potential to increase significantly in the future.

However, there are currently barriers to the growth of this sector. Not all tariffs and services are available for all devices, and there are limited consumer protections to build confidence in the market. To ensure we are prepared for the future, the Government is proposing to implement measures to ensure domestic consumers who choose to use DSR services, are able to get the most benefits from doing so, irrespective of the kind of smart appliance and service they choose. These will also help address the current barriers and market failures that prevent more UK businesses from maximising the potential of DSR for their own growth and for the wider economy.

### 2. Introduction and background

As per the Government response to the 2022 consultation on interoperability and cyber security of energy smart appliances and remote load control “Delivering a smart and secure electricity system”<sup>2</sup> the Government intends to require energy suppliers to make time-of-use tariff data openly available in a common format, over the internet.

<sup>1</sup> <https://www.gov.uk/government/consultations/delivering-a-smart-and-secure-electricity-system-the-interoperability-and-cyber-security-of-energy-smart-appliances-and-remote-load-control>

<sup>2</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1147855/smart-secure-energy-system-government-response.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147855/smart-secure-energy-system-government-response.pdf)



The full details of how this proposal will be delivered are being developed at the moment, but initial thinking is for:

- The tariff information from all suppliers to be made available in a secure, consistent, open, machine-readable, interoperable format via the internet, and be free of charge.
- The scope to include all electricity and gas tariffs, for domestic and smaller non-domestic consumers (with possibility for carve-outs as required and justified). Tariff history and energy consumption history would not be considered within scope.
- The data provided to be primarily intended for optimisation services to consumers' energy smart appliances. Data could be provided directly to devices to provide local optimisation, or to an optimisation organisation's platform to allow that platform to send optimisation instructions on to devices.

Previous work has identified:

- User needs for this data.
- A "minimum viable product" (MVP) set of tariff data items required to meet these user needs (i.e., the beginnings of a data schema).
- A suite of technical options to deliver this data in an open, machine-readable, interoperable format via the internet or smart meter network.
- Evaluation on deliverability, risks, rough order of magnitude costs, and how well each option meets user needs.
- Two leading options: data being delivered by supplier-hosted APIs, which might be via a) a standardised API schema across all suppliers, or b) a government provided list of data items it must include, but with the schema left unstandardised.

A Government-lead industry working group (Tariff Interoperability Working Group) is considering the development of the above options and data standard in further detail.

The focus initially is on a simple MVP – a simple minimum set of agreed data items provided via a simple API based mechanism. We would like to test this MVP on energy suppliers and other relevant stakeholders, who ultimately will be key to delivery, in terms of timescales, costs and delivery options.

Once the MVP is agreed, we are proposing that the standardised GB tariff API schema is housed in an industry code, most likely the Retail Energy Code (REC).

Following on from the development of this MVP standardised GB tariff API schema, we are also considering further technical expansions that might advance the policy or become needed in future to accommodate more advanced tariff types. This phased approach would allow suppliers to bring the MVP data to market quickly, and then allow flexibility for how the technical standard advances to accommodate changes in the tariff market. Technical expansions include, for example, if it should be possible for a consumer to authenticate themselves and receive the details of their own tariff and associated contract dates. Other items which have been identified as potential useful expansions would be standardisation of additional and optional data items beyond the MVP data item spec (for example, supplier specific carbon intensity), and inclusion of event driven architecture, which would allow the creation of real time updates to tariff information. Our initial view is that a working group made up of industry would input on this roadmap of future development, but alterations to the agreed MVP standardised GB tariff API schema would be taken forward via a modification process in the REC.

### 3. Contract requirements

- 1) Conduct stakeholder engagement with energy suppliers and other relevant market participants on the leading two options in terms of:
  - a. Scale (cost and time) of technical and non-technical work for different suppliers to develop the API (either to a standardised schema or a non-standardised one). This should probe scale of both the back-end and the front-end work.
  - b. Whether any centralised cryptographic arrangements will be needed to support the arrangements– for example to allow consumers of the data to verify the authenticity and integrity of the information. It will have a material bearing on what we might need to write in the REC.
  - c. Preferences on if there should be any standardisation of the API schema.
  - d. Views on the necessity of the proposed roadmap, namely authentication, additional data items or technology to underpin real-time tariff updates.
  - e. Views on any relevant international standards
  - f. Views on next steps e.g., the potential role of the Tariff Interoperability Working Group (TIWG) to draft standards, use of the Retail Energy Code to house the agreed standard, modification process to that standard, etc.
- 2) Create an independent cost and time estimate for small energy supplier to contract out the development of a tariff API. This could be a) to a standardised schema or b) a non-standardised schema. This should take into account scale of both the back-end and the front-end work, as also informed by the stakeholder engagement described above.
  - a. This will represent an “independent view” during the TIWG discussions, to help assure that cost estimates being brought by energy suppliers are reasonable/accurate. Assumptions made about costs will need to be documented and may be shared with other energy suppliers more broadly.
- 3) Provide a view on if there are international standards which the GB API tariff could align with. One example of this would be OpenADR3.
- 4) Building on the GDS technical and data standards<sup>3</sup>, provide the department with best practice guidance on non-functional requirements for the GB Tariff API, including requirements on security, uptime, capacity, and versioning. This will inform the departments position during TIWG meetings.
- 5) Develop options for the regulator Ofgem to conduct assurance on the APIs being offered, i.e. technically verify that energy suppliers APIs are meeting:
  - a. The API schema standard
  - b. Non-functional requirements like uptime and security
  - c. Requirements on keeping the API data accurate and up to date.
  - d. This assurance could range from a low-tech solution (a central email for consumers to submit issues which would be raised as infractions to energy suppliers), mystery shoppers checking that an energy supplier’s API is working as required, to automated monitoring of the API.

<sup>3</sup> <https://www.gov.uk/guidance/gds-api-technical-and-data-standards>

#### 4. Ways of working

We expect the procured expertise:

- to develop a detailed project plan alongside the project team, setting out clear milestones whilst maintaining flexibility to changing priorities over the work period
- to be integrated into the project team, attending relevant team meetings and work sessions
- to approach the work in an Agile manner, producing a steady flow of outputs throughout the course of the contract
- to upskill team members where appropriate
- to make use of their external contacts network and facilitate external stakeholder engagement (pre-agreed with DESNZ)
- To interact with other relevant projects as required (especially associated projects on: interoperability and security architectures; and communications modelling)

#### 5. Timescales and Deliverables

We are seeking to procure this expertise from January 2024 until the conclusion of the project.

The output of the work should take the form of a preliminary report to officials setting out the analysis and making recommendations on how each of the above issues should be resolved.

Following discussion of the preliminary report, a final report should be produced taking into account the Department's comments. The final report should be in a format that is suitable for forming the basis for a public consultation on the recommendations.

The main deliverable will be a short form Word style report (10-20 pages) setting out findings against the work detailed in Section 3 above. DESNZ may use this content as input into DESNZ documents and reports. We expect an interim report, before the 29<sup>th</sup> March 2024.

Contract requirement to be fulfilled in 2 phases.

Phase 1: delivery deadline 31st March 2024

- Delivery of Req.1,2, and 3 of the Section 3
- Phase 1 draft report summarising 1,2, and 5

Phase 2: deadline 31st April 2024

- Delivery of Req. 4 and 5
- Full Final report.

## 6. Experience required of service provider

Essential:

- Energy sector, including market.
- Smart energy system
- Data service expertise
- Knowledge of relevant standards
- Qualitative analysis
- Experience/knowledge of interoperability in energy context
- Knowledge of RESTful API development

## 7. Supplier selection / bid evaluation

- Bidders should clearly set out their phasing of inputs and detail costs, broken down by output in line with the phasing and commensurate division of effort set out in this RfP. Total cost should not exceed £30k-50k excluding VAT.
- Please structure your bid as follows:
  - Introduction - comprising a statement of relevant organisation experience and demonstrating understanding of the objectives and policy environment.
  - Methodology – please set out the methodology used to meet the requirements, including details of any external stakeholder input required.
  - Team overview and key points of contact
  - Costings, broken down by output, number of days of proposed individuals, and day rates.
  - Annex: summary CVs of key team members (not scored)
- In evaluating the bids, DESNZ will consider the following:
  - Understanding the Environment (20%)
  - Approach and Methodology (25%)
  - Staff to Deliver & Risk Management (15%)
  - Project Plan, Timescales and Quality Assurance (10%)
  - Social Value the commitment(s) their organisation will make (10%)
  - Cost (20%)

## Section 5 – Evaluation of Bids

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

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

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

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

Pass / Fail Criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	SEL1.10	Information security requirements
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW4.3	Contracts with suppliers from Russia or Belarus
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote response received on time within the Jaggaer eSourcing Portal
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

## Scoring criteria

### Evaluation Justification Statement

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

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.3	Price	20%	20%
Technical	PROJ1.1	Understanding the Environment	80%	20%
Technical	PROJ1.2	Approach and Methodology		25%
Technical	PROJ1.3	Staff to Deliver & Risk Management		15%
Technical	PROG1.4	Project Plan, Timescales and Quality Assurance		10%
Technical	PROG1.5	Social Value - Social Value - Fighting Climate Change MAC 4.1 – Achieving Net Zero		10%

## Evaluation of criteria

### Non-Commercial Elements

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

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

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

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

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.

60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

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

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

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

(Maximum marks available in this example being 12.5)

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

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

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

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

## Evaluation process

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

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



## **Section 6 – Evaluation Response Questionnaire**

Bidders should note that the evaluation response questionnaire is located within the **Jaggaer eSourcing Portal**.

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

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

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

## Section 7 – General Information

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

#### DO:

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

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

### DO NOT

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

## Some additional guidance notes

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

**Phone** 08000 698 632

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

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

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

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

- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Jaggaer eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional 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 Jaggaer eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

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

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

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

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

## USEFUL INFORMATION LINKS

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

## **8.0 Freedom of information**

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

## **9.0. Timescales**

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

## **10.0. The Contracting Authority's Contact Details**

- 10.1 Unless stated otherwise in these Instructions or in writing from UK SBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this

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

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

## Appendix A – Glossary of Terms

TERM	MEANING
“UK SBS”	means UK Shared Business Services Ltd herein after referred to as UK SBS.
“Bid”, “Response”, “Submitted Bid”, or “ITQ Response”	means the Bidders formal offer in response to this Invitation to Quote
“Bidder(s)”	means the organisations being invited to respond to this Invitation to Quote
“Central Purchasing Body”	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
“Conditions of Bid”	means the terms and conditions set out in this ITQ relating to the submission of a Bid
“Contract”	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
“Contracting Bodies”	means the Contracting Authority and any other contracting authorities described in the Find a Tender Notice
“Contracting Authority”	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
“Customer”	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
“Due Diligence Information”	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
“EIR”	mean the Environmental Information Regulations 2004 together with any guidance and / or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
“Find a Tender”	Means the UK Government Portal that superseded the OJEU as from 1/1/2021 <a href="https://www.find-tender.service.gov.uk/Search">https://www.find-tender.service.gov.uk/Search</a>
“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. <b>NOTE:</b> This document is often referred to as an Invitation to Tender within other organisations
“Mandatory”	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
“Named Procurement person”	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
“Order”	means an order for served by any Contracting Body on the Supplier
“Supplier(s)”	means the organisation(s) awarded the Contract
“Supplies / Services / Works”	means any supplies/services and supplies or works set out at within <u>Section [4] Specification</u>