



Food and Drink Sector Research and Targeting

Tender Ref: MID2017/1

Document A
Invitation to Tender and Requirements
V1.0

13 March 2017



European Union
European Regional
Development Fund

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1.0 Letter of Invitation

Dear Sir/Madam

Invitation to Tender for Food and Drink Sector Research and Targeting

You are hereby invited to submit a tender for the above services.

The Invitation to Tender contains Instructions and Information for Tendering, Specification of Requirements, Supplier Questionnaire (including Form of Tender and Pricing Schedule), and MIDAS Contract Conditions.

Tender submissions must be received by **5pm on Wednesday 29th March 2017**.

If you wish to submit a response, you are required to return **two hardcopy proposals** and **one electronic version** of your proposal on USB or CD by 29th March 2017. Envelopes should not identify your business in any way and you must clearly display the Tender Label.

Please note that if it is found that there is discrepancy between the hardcopy version and the electronic version, the hard copy version will take precedence.

All submissions are time stamped and any submissions received after this time will not be accepted.

If you have any questions about this tender or its process, please email them to: info@midas.org.uk.

We look forward to receiving your tender response.

Yours faithfully

Tim News
Chief Executive

2.0 Introduction

2.1 Document Pack

The purpose of this document is to set out the application procedure for service providers who wish to tender for the opportunity titled on Page 1 of this document.

On receipt of the Invitation to Tender (“ITT”), bidders should read all of the tender documents listed below. If you believe that any of these have not been provided to you then please contact info@midas.org.uk.

The ITT document pack includes:-

Document A (this document) – Invitation to Tender and Requirements

Document B – Written Tender Response for Supplier

Document C – Pricing Matrix

Document D – MIDAS Standard Terms and Conditions

Document E – Form of Tender

Document F – Questions and Answers Document*

Document G – Tender label

All documents are available to download at:

<http://www.investinmanchester.com/services/about/tenders/>

*Please note that Document F is a live document that will be updated on the website on a regular basis. It is your responsibility to ensure that you check this frequently as it may contain information of material significance which is critical to the submission of your tender. Please contact info@midas.org.uk to raise a question.

2.2 Procurement Timescales

The following table identifies the expected timeline for the remainder of the sourcing exercise:-

Activity	Timing
Invitation to Tender Issued	Monday 13 th March 2017
Tender Queries Deadline	5pm Thursday 23 rd March 2017
Tender Deadline	5pm Wednesday 29 th March 2017
Tender Scoring and Analysis	3 rd and 4 th April 2017
Award Notification	Friday 7 th April 2017
Envisaged Contract Start Date	Monday 10 th April 2017

It is envisaged that no further amendments will be made to the timeline however all bidders will be notified if any amendments are made.

2.3 Introduction to MIDAS

MIDAS is the inward investment agency for Greater Manchester, providing free of charge advice and assistance to national and international organisations looking to locate in the area or expand their existing operations. MIDAS' services include the provision of market research and labour information, assistance with finding property, access to finance and help to recruit and train staff.

For further information on MIDAS, please go to www.investinmanchester.com.

MIDAS is part of the Manchester Growth Company which has been established to achieve a transformation of the Greater Manchester economy, delivering on the priorities set out in the Greater Manchester Strategy – providing the research and analysis to drive policy and delivery, raising Manchester's profile, attracting investment, helping businesses grow and providing individuals with new skills and employment opportunities.

Accountable to the Greater Manchester Local Enterprise Partnership and Greater Manchester Combined Authority (GMCA), MIDAS ensures inward investment is attracted to Greater Manchester and existing companies are supported to re-invest in the region.

3.0 Contract Details

3.1 Scope of Tender

3.1.1 Project Overview

The key deliverable of this project is for MIDAS to be provided with **a longlist of 100 recommended target companies, 40 validated leads in the Food and Drink Manufacturing Sector with meetings arranged with 20 of these.**

MIDAS has a remit to attract inward investment and R&D collaboration to Greater Manchester, to support the expansion of existing investors in the region and to promote Greater Manchester as leading business location.

An economic powerhouse and the UK's fastest regional economy, Manchester has developed a strong reputation as a competitive place to do business. Situated within the UK's largest centre of manufacturing employment, 52,000 people are employed in food and drink manufacturing across the North West region.

Greater Manchester is the centre of food manufacturing in the North West, employing 40% of all employees in the sector, equivalent to 21,000 people. The city region is home to some of the world's largest brands including Unilever, Heinz, Kellogg's, United Biscuits and Heineken and is also home to some iconic products including PG Tips pyramid bags, Jaffa Cakes and Heinz Baked Beans.

Manchester's food and drink sector is dynamic and the city region's capability in the sector extends across all major subsectors including frozen, chilled and ambient. With more than 300 food and drink manufacturing companies located in Manchester, the city is a proven location for manufacturing within the sector.

Since the UK's decision to leave the European Union, food and drink manufacturers in the UK have been affected by fluctuations in the currency markets with the price of imported commodities increasing significantly. With the UK as a growing consumer market, many manufacturers are evaluating the opportunity to 'on-shore' production as a means to reduce transport costs and pre-empt potential impacts from 'Brexit'. Furthermore, on-shoring production is seen as a mechanism to enable manufacturers to secure proximity to consumer markets and key customers. As a consequence of the change in market conditions, an opportunity exists to explore the potential for on-shoring within the food and drink manufacturing sector. Initial research has highlighted Ireland and Germany as having particular opportunities for on-shoring. MIDAS is also keen to understand other market opportunities including Spain and Italy. Manchester is a key UK food industry cluster and is well placed as a location for food and drink manufacturers seeking to establish production in the UK.

MIDAS is now looking to undertake independent research regarding the opportunities for the on-shoring of manufacturing within the food and drink sector following the UK's decision to leave the European Union. From this, we require the identification of 40 target manufacturers within the sector, with meetings secured and executed with at least 20 of the companies identified, with a view to accelerating lead generation and inward investment for Greater Manchester in 2017 and 2018.

3.1.2 Detail of Requirements

We require:

1. A detailed independent strategic review of the food and drink sector in Europe in order to provide context (key trends, developments, barriers).
2. Identification of current and growth subsectors within the food and drink sector that best align with Manchester's strengths and present a market opportunity for Greater Manchester.
3. A SWOT analysis of the Greater Manchester offer in relation to the food and drink sector, along with a clear profile of the types of companies which are most likely to benefit from on-shoring.
4. A long list of 100 recommended food and drink manufacturing companies to target, with a high level overview of each company. Details of the supplier's methodology for the selection of these companies should be detailed within the response to the tender.
5. A validated short list of a minimum of 40 priority food and drink manufacturing companies to target within Europe, with a particular focus on (but not limited to) Ireland and Germany. For each company, MIDAS

requires a summary of the company and an explanation of the rationale for selection relevant to the potential to invest in Greater Manchester. Details of the supplier's methodology for the selection of these companies should be detailed within the response to the tender. MIDAS expects to sign-off on this short-list before proceeding to the next stage.

6. Validated leads for a minimum of 20 of these target companies, with meetings secured for MIDAS with key decision makers/influencers within the company either on-site at Head Office or at a relevant Food and Drink event. MIDAS expects the appointments to be arranged predominantly with companies in Ireland and Germany, with any appointments outside these areas agreed in advance with MIDAS.

In order to satisfy each of those requirements:

1. We expect the overall review of the Food and Drink sector to be a European macro-level horizon scan, with a focus on future trends and assessment of how Greater Manchester's offer aligns with developments in the sector. We expect any opportunities or trends for the creation/growth of subsector clusters within Greater Manchester to be identified.
2. To confirm the top subsectors with the greatest potential for Greater Manchester, we expect:
 - 3 or 4 subsectors to be identified, which will allow for more in depth analysis at subsequent stages. A limited number subsectors are deemed suitable for the researcher to focus on, and for MIDAS to be able to action on, on return of the strategic targets lists.
 - Identification of the subsectors which will create the most positive economic impact across Greater Manchester through inward investment or R&D collaboration, with an assessment of the potential for high value and volume job creation.
 - The subsectors to be qualified against a detailed understanding of Greater Manchester's sector offer and relative to the subsectors identified.
3. The SWOT analysis should focus primarily on understanding the market opportunities for European investors within the Food and Drink Sector to on-shore to the UK within the context of Brexit. For example: market potential/market trends/market demand. From the SWOT, the key deliverable should be the clear identification of market opportunities including assessment of Greater Manchester's strengths and weaknesses in relation to the opportunities identified.
4. The researched longlist of 100 food and drink manufacturing companies. A sound filtering model should be used in order to identify companies with a propensity to invest. MIDAS expects to receive details of the filtering model applied. We expect the high-level information on each company within the following columns: company names; company size (employees and turnover); country of origin; headquarter city; other UK city locations; sector and subsector. MIDAS expects to approve this long-list before proceeding to the next stage.
5. From this longlist, the supplier will produce a shortlist of 40 named priority strategic target companies, the bulk of which will be focussed on Ireland and Germany. A sound filtering model should be used in order to identify companies with a propensity to invest. MIDAS expects to sign-off details of the criteria to be applied in identifying the companies. We expect:
 - Information on the following: company name, SME classification, country of origin, headquarters city, other UK city locations, and subsector.
 - This shortlist should be based on an understanding of the research carried out, current market trends, knowledge of FDI within the Greater Manchester region and lead MIDAS to immediate and long term prospects. The companies should be a strategic fit to the region.
 - For each company identified we require:
 - Company overview (products/services, strategy, profitability).
 - International operational footprint (headcount, recent changes e.g. new sites/closures).
 - Triggers observed for the company to look at location strategy (e.g. regulation, plans for expansion/consolidation, cost reduction, peers going through similar projects).

- Assessment of the company's alignment with Greater Manchester's Food and Drink sector strengths
 - An understanding of key decision making criteria
 - Individual contact names - appropriate current contacts within the senior management team (e.g. CEO/CFO/COO/MD/Head of Business Location Strategy)
 - The angle for Greater Manchester
6. From this list of named strategic targets, we expect leads to be validated for a minimum of 20 food and drink manufacturing companies; with meetings secured and executed for MIDAS with each company either on-site at Head Office or at a relevant Food and Drink Event. We would anticipate that these 20 company meetings would be focussed on one or two market visits or relevant industry events. We expect these meetings to be arranged with companies in our key target markets of Ireland and Germany, with any meetings outside these areas being agreed in advance with MIDAS.

3.1.3 Providers Responsibilities

The supplier will provide MIDAS with a complete report in Word covering:

- A. A horizon scan of the industry trends in the European Food and Drink sector, with the top growing subsectors identified which provide a credible opportunity for Greater Manchester to attract future inward investment, along with a SWOT analysis of Greater Manchester's existing offer.
- B. A researched long list of 100 recommended food and drink manufacturing companies to target with a high level overview of each company. Details of the supplier's methodology for the selection of these companies should be detailed within the response to the tender.
- C. From this longlist, a validated short list of a minimum of 40 priority food and drink manufacturing companies with a particular focus on (but not restricted to) Ireland and Germany, including a summary of each company and its investment potential within Greater Manchester, with a clear outline of the method used to identify these targets. MIDAS expects to approve this short-list before proceeding to the next stage.
- D. Appointments made and executed with a minimum of 20 validated companies from the target list, either on-site at their Head Office in Ireland or Germany, or at a relevant Food and Drink event. Any meetings outside of Germany and Ireland will need to be agreed in advance with MIDAS.

The supplier will be required to:

- Liaise with the sector Head of Business Development to kick off the project.
- Develop an understanding of the MIDAS offer to be able to approach targeted companies with credibility.
- Provide a timeline of deliverables
- Identify sources of information and methodology to be used
- Assign a Project Manager
- Provide a biography of the Project Manager and key team members
- Provide an interim report (Word or PowerPoint) of findings and proposed strategy for implementation midway through the project to ensure that deliverables are in keeping with client expectations.
- Initiate a regular conference call with the client to update on progress
- Present their final findings to MIDAS.
- Maintain all material for potential future re-engagement to refresh or investigate further.

3.1.4 Performance Monitoring

MIDAS expects 3-4 subsectors to be identified, 100 target food and drink manufacturing companies identified, 40 validated leads to be identified, and appointments arranged and executed with 20 of the target companies. The first piece of work that MIDAS will receive from the supplier will be the interim report.

It will be important for the supplier to maintain contact with the relevant sector Head of Business Development through regular conference calls.

3.2 Duration

The tenderer is invited to advise MIDAS of the timeframe to complete the research and provide strategic targets. It is envisaged that MIDAS would receive the research report and validated leads list within the first quarter 2017/18 (April-June 2017), with the company appointments made and executed within three months of the conclusion of the report and validated lists.

The total budget for this project will not exceed **£20,000 excluding VAT**.

3.3 Terms and Conditions

A copy of the proposed Contract Terms is provided in Document D. Please note that bidders are required to provide confirmation in the Form of Tender, Document E, that they accept the terms of the Contract and that this has been approved by Directors or Partners, insurers and legal advisors as required.

If any bidder has any queries regarding the terms of the agreement then these should be clarified in writing prior to submission of tenders.

3.4 Subcontracting

Where information is requested by MIDAS in respect of your organisation on an on-going or ad-hoc basis, in the case where sub-suppliers are used by your organisation, you will be required either to provide this on their behalf or they (the nominated sub-suppliers) shall be required to provide this directly to MIDAS. Please note that only consultants who are selected for the contract following evaluation of tenders can be commissioned for work over the project lifetime.

3.5 Overview of the Process

MIDAS has elected to utilise a fully open single stage tender process, and all bidders are invited to submit a tender for this opportunity. Only those meeting MIDAS's Suitability Assessment requirements, however, will be eligible to have their tender assessed in full as set out below:

1. Minimum Suitability Assessment (Categories 1-5 in Document B –Tender Response and Documents C and E)

This is to assess tenderers against minimum standards with respect to economic and financial standing and technical capacity.

2. The full Written Tender Response (Category 6 in Document B Tender Response)

The full Written Tender Response is only assessed for those bidders who have passed the minimum standards questions and who will then be assessed on the deliverability and competitiveness of their submitted responses. The Written Tender Response allows for the following:

- Enables MIDAS to assess the competitiveness of each applicant's service provision;
- Any clarifications on bidders' responses can be assessed at the time of submission, and included within the evaluation. Bidders should note that the deadlines for responses to clarifications may be short, but must be met; and
- Ensures MIDAS can assess the overall strategic fit of the applicant with their aims and objectives.

The Written Tender Response will be evaluated on the basis of M.E.A.T, the 'Most Economically Advantageous Tender', i.e. as per the Public Contracts Regulations 2015, Best Price-Quality Ratio (BPQR), based on the criteria listed in Section 4.5.

4.0 Tender Submission and Evaluation

4.1 Instructions for Submission and Deadline

This section sets out the documents that you will need to complete in order to submit a tender. It is essential that you read this section carefully and also all of the tender documentation and that you ensure that, when submitting your tender, all of the required information requested is provided.

Any tender that has not been submitted in line with the instructions provided may be deemed to be non-compliant and will not be evaluated.

Bidders are required to initially submit:

1. A Written Tender Response (Document B) answering the Tender Specific Questions (one per lot) and a Suitability Assessment Questionnaire (one per supplier).
2. A Pricing Matrix (Document C) to be completed by the organisation/company
3. Form of Tender (Document E) - hard copy with wet ink signature, to be completed by the organisation/company

MIDAS does not acknowledge receipt of tender documents and accepts no responsibility for loss or non-receipt of applications.

4.2 Freedom of Information

MIDAS is committed to meeting its legal responsibilities under the Freedom of Information Act 2000 (the "Act"). Accordingly, all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the Act. MIDAS may also decide to include certain information in the publication scheme which it maintains under the Act.

If a bidder considers that any of the information included in their tender is commercially sensitive, it should identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity.

Bidders should be aware that, even where they have indicated that information is commercially sensitive, MIDAS may be required to disclose it under the Act if a request is received.

Bidders should also note that the receipt of any material marked 'confidential' or equivalent by MIDAS should not be taken to mean that MIDAS accepts any duty of confidence by virtue of that marking.

4.3 Queries and Support

If you have a query which has not been addressed by this document or the supporting documentation, please submit a question via info@midas.org.uk.

Please ensure any question has the following in the Subject:

TENDER CLARIFICATION QUESTION: CONTRACT REF MID2017/1.

Emailed questions that do not contain this information in the subject heading will not be answered.

In order to ensure that responses to all queries can be published in advance of the tender deadline, we ask all bidders to submit queries by the date stated for "Tender Queries Deadline" in 2.2 of this document. Any questions received after this date may not be answered.

To ensure equality of treatment amongst all participants any relevant clarification responses will be made available to all bidders at www.investinmanchester.com/tenders in a Q&A document (Document F) that will be updated and uploaded on a regular basis.

Publication of the questions is subject to the material significance of the question. Questions which relate to bidders' commercially sensitive information, or are directly applicable to one applicant, shall be suitably censored prior to publication, to retain anonymity, but bidders must explain and justify why the information is regarded as commercially sensitive; the presumption which MIDAS will apply is that it is not.

Bidders should note that the clarification questions and answers form part of the ITT supporting documentation.

4.4 Word Limits

Within the Document B - Written Tender Response, a number of questions state a maximum word count and the answer to these questions must be limited to the maximum number of words indicated. Please note that any content which exceeds this word limit in respect of each question will not be scored and will be disregarded when evaluating the Tender Response.

Appendices, charts, diagrams or screenshots may be included and do not count towards the total word limit.

The evaluation team will not consider any references to external sources/hyperlinks referenced in your bid.

4.5 Evaluation of Tenders

Following the submission deadline, tenders will be evaluated by a scoring team comprising representatives of the MIDAS.

Bidders may be required to clarify aspects of their submission in order to ensure that they have understood the specification requirements. Bidders will be contacted individually regarding any such clarifications. Please note that the deadlines for clarification responses may be short, but must be met in order that submissions can be included within the evaluation process.

Tenders will be subject to a staged evaluation process as follows:

4.5.1 Stage 1: Initial Screening Assessment

Each submitted tender will be subject to an initial screening assessment to confirm that:

- The tender has been submitted on time, is completed correctly, is materially complete and meets the Suitability Assessment (Minimum Standards) requirements of this Invitation to tender to enable it to be evaluated in accordance with the evaluation criteria;
- The bidder has not contravened any of the terms and conditions of the tender process either provided in the Public Contracts Regulations 2015 and/or this Invitation to Tender.

Tenders that are not substantially complete or which are non-compliant with the requirements of the Invitation to tender will be rejected at this stage.

4.5.2 Stage 2: Suitability Assessment (Minimum Criteria)

There are a number of criteria which must be satisfied in order for an applicant to be eligible to proceed to the capability / quality evaluation stage. The completed Suitability Assessment questions (Document B Written Tender Response) will be evaluated first and scored on a pass or fail basis. Guidance is provided below in Appendix 1.

Category	Criteria	Section Weighting
Suitability Assessment	1. Company Background	Information Only
	2. Mandatory and Statutory Requirements	Pass/Fail
	3. Economic and Financial Standing	Pass/Fail
	4. Quality Assurance	Pass/Fail
	5. Equality and Diversity	Pass/Fail
	6. Environmental and Sustainability	Pass/Fail

Category	Criteria	Section Weighting
	7. Contract Delivery	Pass/Fail

4.5.3 Stage 3: Quality and Price Evaluation

Tenders which are successful following the initial screening assessment will be subject to a detailed evaluation in accordance with the evaluation criteria and weightings set out below:-

Criteria	Weighting
Quality	70%
Price	30%
Total	100%

i) Quality Evaluation

Responses to each of the written tender questions (**see Document B, Section 8**) will be scored by the evaluation panel out of a maximum of five marks, using a standard method of scoring as set out in the table below:

Classification	Score	Scoring Guidance
Exceptional	5	Addresses the majority of the requirements at a very high level.
Above Average	4	Addresses most of the requirements at a high level.
Average	3	Addresses some of the requirements at a high level.
Below Average	2	Addresses some of the requirements at a basic level.
Poor	1	Does not address / barely addresses the requirements.
Unacceptable	0	Does not meet requirements / no response.

Any Bidder scoring either a 0 or 1 for any quality questions will be excluded from the process.

Please do not make references to other questions within your submission or other documentation/external sources of information.

Guidance for completing this section can be found in Appendix 2.

During the evaluation of quality submissions, MIDAS reserves the right to call for further information or clarification from bidders, as appropriate to assist in its consideration of their tender. In addition, MIDAS reserves the right to exclude from the tendering process any organisation that is found to have provided false information or has misrepresented themselves during the tender process.

ii) Price Evaluation

Details of the pricing framework are presented in **Document C**.

Evaluation of the submitted pricing will be as follows:

- a. For Total of Tender Offer, a score shall be calculated by reference to the lowest price submitted. This lowest price will be given a points score of 100 and all other scores will be awarded scores relative to that cost using the following formula:

Elemental score = (Lowest Submitted Cost ÷ Tender Cost) x 100

Please see a worked example below:

Applicant 1 - £110

Applicant 2 - £175

Applicant 3 - £200

Applicant 1 would receive 100 marks as they submitted the lowest price.

*Applicant 2 would receive 62.9 marks as follows: $110/175 * 100 = 62.9$*

*Applicant 3 would receive 55 marks as follows: $110/200 * 100 = 55$*

- b. The score will then be weighted to give a resultant score out of the weighting % detailed in 4.5.3 for the pricing submission.
- c. In scoring the tenders and at the discretion of MIDAS, where it is considered that a tendered price is unrealistically low and/or unsustainable, the lowest tender judged to be realistic and sustainable will be taken as the benchmark for the purposes of price evaluation. The new benchmark and all of those lower than it will receive maximum marks and the others scored relative to that as set out above.

4.6 Interviews

MIDAS reserves the right to hold clarification interviews if required.

If the option to interview is taken the three highest scoring bidders will be invited and bidders selected for interview will be informed in writing.

The interview will not be scored but used to moderate your scores by clarifying information provided in your company's bid.

4.7 Contract Award

Following completion of the evaluation process above, scores will be collated and ranked. The Contract will then be awarded to the highest ranking bidder. All bidders will be informed of the award decisions in writing (via email).

5.0 Social Value

5.1 GMCA Social Value Policy

MIDAS has adopted the principals set out in the [GMCA Social Value Policy](#) and aims to deliver social value through our commissioning and procurement activities.

Social Value is defined in the above policy as follows:

'A process whereby organisations meet their needs for good, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and economy, whilst minimising damage to the environment.'

5.2 Objectives

The objectives of this policy are as follows:

- promote employment and economic sustainability – tackle unemployment and facilitate the development of skills
- raise the living standards of local residents – working towards living wage, maximise employee access to entitlements such as childcare and encourage suppliers to source labour from within Greater Manchester
- promote participation and citizen engagement - encourage resident participation and promote active citizenship
- build the capacity and sustainability of the voluntary and community sector– practical support for local voluntary and community groups
- promote equity and fairness – target effort towards those in the greatest need or facing the greatest disadvantage and tackle deprivation across the borough
- promote environmental sustainability – reduce wastage, limit energy consumption and procure materials from sustainable sources.

5.3 Bidders Response

Bidders are asked to give consideration within their answers where their bid adds value in any of the above areas.

6.0 Additional Tender Conditions

- i. All responses to this Invitation to Tender must be in English.
- ii. Bidders are responsible for obtaining all information necessary for the preparation of their tender submission. Whilst MIDAS will use its best endeavours to see that all information provided is truthful and accurate, bidders must satisfy themselves as to the accuracy of any information provided by MIDAS, and MIDAS do not accept any liability whatsoever for any loss or damage caused or arising from or in consequence of the use of such information;
- iii. All costs and expenses associated with applying for this opportunity shall be the responsibility of the applicant, without recourse to MIDAS, and neither MIDAS nor any of its representatives will be liable in any way to any applicant or other person for any costs, expenses or losses incurred by any applicant or other person in connection with this bidding process;
- iv. MIDAS has the right to discontinue with this sourcing exercise at any time and not award any contract, and shall notify bidders accordingly;
- v. MIDAS shall not be legally bound to any organisation until the resulting contract has been agreed and signed by all stakeholders.
- vi. The bidder must not inform anyone else of their tendered price. The only exception is where the bidder is required to obtain an insurance quotation to calculate the tender price; then the bidder may give details of their bid to the insurance company or brokers, if requested;
- vii. The bidder must not try to obtain any information about any other party's tender or proposed tender before the contract is awarded;
- viii. All elements of tender submission, including responses to clarifications, will form the basis of the contractual arrangement with MIDAS;
- ix. Where invoices will be rendered by, or payments made to, an entity whose title differs in any respect from the title in which the tender is submitted, full details must be provided in a letter accompanying the tender. Successful bidders who fail to provide this will experience non-payment of their invoices;
- x. Bidders should note that MIDAS is not bound to accept any tender submission under this tender and reserves the right at its absolute discretion to accept or not accept any tender submission or part of any tender submitted under this Invitation to Tender.
- xi. Bidders should note that during this tender process they should not contact any of the MIDAS respective Board Members, Senior Managers, employees or advisers or any part of the Economic Solutions Limited Group, or third parties connected to the MIDAS or any advisers to this procurement, outside of the process outlined within this document.

Appendix 1: Organisation Details and Suitability Assessment – Guidance for Completion

Only those who pass the Suitability Assessment questionnaire element and therefore are able to meet MIDAS's minimum standards shall be eligible to have their tender evaluated in full and in line with the Overall Contract Award Criteria specified. Responses should be captured in Document B by each bidder organisation

The Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (we call this self-cleaning).

Consequently we require all the organisations that you will rely on to meet the selection criteria and may be asked to complete Categories 1-3. For example these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria.

Organisation Details and Suitability Assessment

Category Number	Question Number	Question	Possible Answers	Answer
Category 1 Organisation Background	1.1	Please provide the Registered Company Name and Address of your organisation. (This should be the full company name as it would appear within the contractual documentation if successful)	Name Address	Information Only
	1.2	Please provide postal address if different from above	Address	Information Only
	1.3	Please confirm the key contact for this project on-going including name, email address and direct telephone number.	Name Email Address Telephone Number	Information Only
	1.4	Please confirm the email address to be used for any communications with regard to this tender offer.	Email Address	Information Only
	1.5	Are you a Small, Medium or Micro Enterprise (SME)?	Yes/No	Information Only

	1.6	Is your organisation a:	PLC Limited Company Sole Trader Partnership Other	Information Only
	1.7	If other, please specify.	Free Text	Information Only
	1.8	If operating as a Partnership please state the number of Partners.	Free Text	Information Only
	1.9	If your organisation is a member of a group of companies, please provide further details on the holding company, and details of the organisations which make up your group. (maximum response 250 words)	Free Text	Information Only
	1.10	Please provide the date your organisation commenced trading.	Free Text	Information Only
	1.11	Please provide your Company Registration Number.	Free Text	Information Only
	1.12	Please provide your VAT Registration number.	Free Text	Information Only
	1.13	Please select either a or b and answer as applicable; a) Your organisation is bidding to provide all the services required b) Your organisation is bidding in the role of Prime Contractor and intends to subcontract some of the services to third parties to deliver the services.	a or b	

	1.14	<p>If your answer to above is (b), please give details of legal arrangements between partners and supply the following information for each sub-contractor to be used.</p> <p>Name;</p> <p>Registered address</p> <p>Trading status</p> <p>Company registration number</p> <p>Registered VAT number</p> <p>Type of organisation</p> <p>SME (Yes/No)</p> <p>The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables</p> <p>The approximate % of contractual obligations assigned to each sub-contractor</p>	Free Text (Use separate sheet if required)	Information Only
Category 2 Grounds for mandatory exclusion	2.1	Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences below?	Yes or No	<p>The detailed grounds for mandatory/ discretionary exclusion of an organisation are set out on this webpage, which should be referred to before completing these questions</p> <p>If an Organisation answers Yes to any of the statements, MIDAS shall disqualify that Organisation from the process at this point in the evaluation, pending consideration of the self-cleaning statement</p> <p>This information will be used to determine whether suitable measures have been implemented to rectify the situation and prevent future</p>
		i. Participation in a criminal organisation	Yes or No	
		ii. Corruption.	Yes or No	
		iii. Fraud.	Yes or No	
		iv. Terrorist offences or offences linked to terrorist activities	Yes or No	
		v. Child labour and other forms of trafficking in human beings	Yes or No	
	vi. Money laundering or terrorist financing	Yes or No		
2.2	If you have answered yes to the question 2.1, please provide further details.	Free Text		

	2.3	Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?	Yes or No	<p>reoccurrence. If your organisation was at fault and suitable action not taken - automatic exclusion.</p> <p>The Information provided will be reviewed by MIDAS Project Team (Project Team).</p>
	2.4	If you have answered yes to question 2.3, please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.	Yes or No	
Category 3 Grounds for discretionary exclusion	3.1	Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation		
		i. Breach of environmental obligations?	Yes or No	
		ii. Breach of social obligations?	Yes or No	
		iii. Breach of labour law obligations?	Yes or No	
		iv. Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation's assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State?	Yes or No	
		v. Guilty of grave professional misconduct?	Yes or No	
		vi. Entered into agreements with other economic operators aimed at distorting competition?	Yes or No	
		vii. Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure?	Yes or No	
		viii. Been involved in the preparation of this procurement procedure?	Yes or No	

		ix. Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions?	Yes or No	
	3.2	If you have answered Yes to any of the above (3.1), explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion?	Free Text	
Category 4 Insurance	4.1	Please confirm if you currently have, or are willing to commit to the £5 million pounds minimum required level of Employers Liability Insurance applicable for each and every occurrence.	Yes No N/A Willing to Commit to taking out insurance to the required level if awarded the contract	If no, automatic exclusion. If you answer N/A, please state why
	4.2	Please confirm if you currently have, or are willing to commit to the £1 million pounds minimum required level of Public Liability Insurance applicable for each and every occurrence.	Yes No Willing to Commit to taking out insurance to the required level if awarded the contract	If no, automatic exclusion.
	4.3	Please confirm if you currently have, or are willing to commit to the £1 million pounds minimum required level of Professional Indemnity Insurance applicable for each and every occurrence.	Yes No Willing to Commit to taking out	If no, automatic exclusion.

			insurance to the required level if awarded the contract	
Category 5 Economic and Financial Standing	5.1	<p>Please provide one of the following to demonstrate your economic/financial standing;</p> <p>(a) A copy of the audited accounts for the most recent two years.</p> <p>(b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation.</p> <p>(c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.</p> <p>(d) Alternative means of demonstrating financial status if any of the above are not available (e.g. Forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).</p>	<p>Please state which option provided</p> <p>.....</p> <p>Enclosure Required</p> <p>(Please note only one copy required)</p>	Enclosure Required.

Should you have any queries regarding the requirements of the Suitability Assessment questionnaire, then please raise these using the clarification process set out in Section 4.

Appendix 2: Written Tender Guidance

The weighting of individual tender questions are stated in Document B Written Tender Response (Category 6)

Form of Answers - Marks are awarded for clear and concise answers, with the relevant examples and detail where relevant. We do not wish to receive long and unstructured answers; the character limits are an indication of detail required but answers should still be concise.

The information you provide in your answers should be relevant to your organisation and the opportunity for which you are applying. Bidders should note that the weightings of the questions which indicate the importance of that question and ensure that their answers are structured accordingly; ensuring that you provide sufficient and relevant detail in the question response is critical.

The character limits have been set and shall not be changed. (See 4.4)

Bidders should also note that only information provided in the text boxes shall be considered in response to the question – the evaluation team shall not consider any attachments (other than those that may have been specifically requested), references to external sources or current knowledge of the applicant.

Should you have any queries regarding the requirements of the tender questionnaire, then please raise these using the clarification process set out in 4.3.

You should retain duplicate copies of your completed Tender Response for your own records.

Appendix 3: Pricing Guidance

Bidders are required to complete all sections of the **Pricing Matrix (Document C)** for the opportunity for which they have been invited to tender. All fields in red font should be completed on the pricing document and any fields which are not completed may affect the evaluation of your tender.

Please ensure you read the instructions detailed within Document C, prior to completing your pricing matrix.

When completing the pricing submission, bidders should consider the following:

1. Prices will be fixed for the duration of the contract.
2. The prices in the Pricing Schedule shall include for all goods and services shown or described in the contract as a whole and for all goods and services not described but apparent as being necessary for the complete and proper execution of the provision of the contract.
3. Each item in the Pricing Schedule must be fully priced, with insertions for each item. If any item is un-priced (whether by leaving the rate and/or amount space blank or by entering "included" or otherwise), that item shall be deemed to be free of charge.
4. Payment shall be made in accordance with the procedures described in MIDAS' Terms and Conditions (*Document D*).
5. All prices quoted shall be exclusive of Value Added Tax (VAT).
6. Figures inserted into the pricing schedule must be a single figure and not a range of figures. If a range of figures are submitted, MIDAS will evaluate this offer on the basis of the highest figure quoted within the range, thus attracting the lowest possible score.