



Invitation to Quote

**Invitation to Quote (ITQ) on behalf of UK Trade and Investment
(UKTI) Department for International Trade (DIT)**

Subject UK SBS Security Statistics

Sourcing reference number BLOJEU-CR16108

UK Shared Business Services Ltd (UK SBS)
www.uksbs.co.uk

Registered in England and Wales as a limited company. Company Number 6330639.
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UKSBS

Shared Business Services

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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 customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers 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 customers. This allows our customers 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 its customers, UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business Innovation and Skills (BIS) 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 Customers.

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

Section 2 – About Our Customer

UK Trade and Investment helps UK-based companies succeed in the global economy. UKTI also help overseas companies bring their high quality investment to the UK's dynamic economy which is acknowledged as Europe's best place from which to succeed in global business.

The UK Trade & Investment offers expertise and contacts through its extensive network of specialists in the UK and other diplomatic offices around the world.

The organisation provides companies with the tools they require to be competitive on the world stage.

UK Trade and Investment/Department for International Trade achievements include:

- UKTI launched its five-year strategy Britain Open for Business in May 2011 which set out a clear vision for realising the Government's ambitions for growth through trade and investment. During the year it realigned its headquarters function to more effectively deliver this strategy.
- In 2011-12 we assisted 25,000 UK businesses generate around £30 billion of additional sales which created or safeguarded well over 100,000 jobs. We exceeded our target of 750 inward investment successes and helped the UK maintain its position as the second most successful defence exporter, exporting £8 billion of defence and security goods and services.

www.ukti.gov.uk

Section 3 - Working with UK Shared Business Services Ltd.

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	Customer Name and address	UK Trade and Investment (UKTI) Department for International Trade 1 Victoria Street, London, SW1H 0ET
3.2	Buyer name	Laura Barrowman
3.3	Buyer contact details	research@uksbs.co.uk
3.4	Estimated value of the Opportunity	£105,000
3.5	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available here. 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.

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	02/11/2016 Contracts Finder
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	18/11/2016 14:00
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	25/11/2016 14:00
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	02/12/2016 14:00
3.10	Anticipated rejection of unsuccessful Bids date	16/01/2017
3.11	Anticipated Award date	16/01/2017
3.12	Anticipated Contract Start date	01/02/2017
3.13	Anticipated Contract End date	31/05/2018
3.14	Bid Validity Period	60 Days

Section 4 – Specification

1. Introduction

The Defence and Security Organisation (DSO) which is now part of the Department of International Trade (DIT), plays a key role in assisting defence and security companies achieve export success by:

- Providing specialist export advice and practical assistance to the UK defence and security sectors – identifying opportunities for business, providing expert market analysis and intelligence, as well as event management support at defence and security exhibitions worldwide;
- Working closely with Industry, the Home Office, and the Ministry of Defence (MOD) to promote the best of British defence technology and design;
- Helping UK defence and security companies to succeed by building relationships with industry and overseas governments.

2. Aims

The DSO is under remit to release Official Statistics for security exports on an annual basis. DSO has been using an independent source since 2007 for this data.

Official stats data enables the DSO to:

- Provide an official and recognised view of the UK's security export performance to both UK industry and other government departments;
- Use data as a baseline for security market analysis;
- Target our support of companies.

DSO seeks to procure, within a two year contract, delivery of 2016 and 2017 Security Export statistics. Payment to be made on delivery of each report within the required timeframe. Annual reports will need to be delivered to DSO in April 2017 and April 2018.

3. Objectives

- Provide Global Security Export Report.
- Provide an official and recognised view of the UK's security export performance to both UK industry and other government departments.
- Use of data as a baseline for Security Export Market Analysis.
- Detail of UK and Rest of the World Security Sector exports.
- Target organisational support to companies and help them to increase exports in the sector by directing them to viable markets.
- The new contract must include company data with Coding linking each company to various activities within the agreed Security taxonomy, i.e. thematic. NB. It must be aligned with HMG's seven Security Export Growth Strategy capability areas: Critical National Infrastructure (CNI) Protection; Cyber Security; Policing and Counter-Terrorism (CT); Major Event Security; Border Security; Offender Management, and Services (including Consultancy, Training, Guarding and Risk Analysis).
- For Cyber Security specifically, we expect the bidder to match the taxonomy/classifications outlined on page 5 of an official document accessible at: <https://www.gov.uk/government/publications/your-cyber-security-in-safe-hands>
- On the advice of DIT Statisticians, any future contract must include an easier to understand methodology, which allows users to replicate the figures themselves, including the gathering of raw data. Its is important to us that our timeline series can be maintained.

4. Background to the Requirement

For many years, UKTI DSO (formerly the MOD's DESO) published figures on the Global Defence Export Market. For UK Defence Exports specifically, a survey is managed by the team of UK Defence companies, where they provide details of exports recorded on their order books. This information is fundamental to our analysis and understanding of trends in the market and the advice that we provide about the UK's performance in the market. The Statistics help us identify the defence industry's strengths and weaknesses and how we compare to our competitors whilst dealing with ad-hoc queries of trends and business opportunities.

Whereas the Defence sector covers large platform sales, the Security sector is more difficult to quantify; it is predominantly SME's and contracts could cover a much broader range of customers in both public & private sectors. This tender seeks bids from companies/organisations that may be able to offer analysis of the Global Security Market for the following period; 2016-17, in addition to the underlying data. Organisations bidding for the tender could propose their own definitions and ways of collating data; however, there is a need to be open with clear and supporting methodology to demonstrate trends within the Sector, and definitions must be agreed with DSO. Country coverage should also be reasonably practicable with at least the top 80 economies, showing Intra-Trade between the nations.

Annex A lists the seven security capability measurements for the Security Export Growth Strategy from which we expect the contractor to comprise the overall statistics.

5. Scope

Data to be made available to DSO in spreadsheet format to include Export values (sales) by each product and the ability to build league tables of top exporters and importers etc. A robust and centralized source is also required to show Companies inputs in country and export/import data to highlight key factors and data, to collaborate figures and trends of markets.

DSO expects the report to cover the following:

Executive Summary

Methodology

- Sector Definition
- Data Sources

Global Security Market

- Global Sales (including domestics)
- Global Security Exports
- Global Security Companies Exports
- Historical Growth Rates (2014-16)
- Forecast Global Growth Rates (2017-21)
- Domestic Market values

Security UK

- UK Security Sales
- UK Security Companies
- UK Security Employment
- UK Security Growth- Current
- UK Security Growth- Forecast
- UK Security End User Markets (Public or Private Sector)
- UK Security Summary

Security UK Imports

- Introduction
- UK Security Imports by Year
- UK Global Imports by Sub Sector
- UK Imports by Country

Security UK Exports

- UK Exports by Sub Sector
- UK Exports by Country
- UK Exports by Country and by Market
- UK Export by End User Market (Public or Private sector)
- UK Exports Ranked by Country

Any data provided to us must be bespoke and not sold to any other company or Organisation without the permission of DSO.

6. Requirement

Mandatory

- To produce two annual reports for calendar year 2016 and 2017 identifying the value of the Global Security Export market.
- Identify specific transactions where a sale has taken place (Including company figures).
- Data made available to DSO in spreadsheet format; data to be recorded and analysed in a rigorous and systematic way, using appropriate software both to manage and analyse the data.
- An open and transparent methodology paper must accompany both reports.
- The research instrument/survey must be fit for purpose, addressing the research aims and objectives. If a survey method is used, we would expect to see evidence of a good response rate.
- Whilst ensuring our required information is collected, adequate permissions must be sought, and the confidentiality of respondents and their affairs maintained throughout.
- Findings to be reported in a clear and logical way, and are transparent and replicable.
- Important Quality Assurance note: Please include in your tender a summary of your quality assurance procedures for data collection and storage, data checking, analysis, and any other aspect of the survey process you feel relevant

Desirable

- Employment/Growth figures

Information

The Security Statistics play a key part in the delivery of the Official Statistics. There are a number of customers who rely on these Official statistics both within Industry and other governmental departments:

- UK industry/security Trade associations: To aid their own planning, to see where business is being won and help them target markets where there is a realistic chance of success.
- DSO Market Analysis team: To gain an understanding of the global security market place, global competitors, and UK performance by sub sector. This is then published as Official Statistics and extracts used in bespoke reports and presentations as required.
- BEIS and Other government departments, including Cabinet Office and Home Office: Used as part of the whole of government approach to exports, to deliver the government's 2020 objectives: £1 trillion in exports, 100,000 additional exporters.
- The general Public: The ability measures the success of the UK Security sector and demonstrates that the government is providing value for money in its support.

Annex A covers the seven Security Export Growth capabilities highlighted within the 2014 governmental report.

Our 'Official Statistics'

For additional information on our previously released export figures ('Official Statistics'), please access the July 2016 release of 2015 data at: <https://www.gov.uk/government/statistics/uk-defence-and-security-export-figures-2015>

7. Timetable

Timetable

A need to collate data from 2016 figures and to gain an overall historical layout of Security figures for a minimal for 5 years to assist with the Official Statistics Status. An overall requirement for tender to be up and running before December 2016 including frequent and regular communication with DSO either in person or at meetings.

Delivery of Source has been highlighted (below)

2016 figures	30 April 2017
2017 figures	30 April 2018

Section 5 – Evaluation model

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, the Customer and any specific external stakeholders UK SBS deem required. After evaluation the scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ($5+5+6=16\div3=5.33$))

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Commercial	SEL2.10	Cyber Security Essentials
Price	AW5.5	E Invoicing
Quality	AW6.1	Compliance to the Specification
-	-	Invitation to Quote – received on time within e-sourcing tool

Scoring criteria

Evaluation Justification Statement

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

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20%
Quality	PROJ1.1	Understanding	20%
Quality	PROJ1.2	Methodology	40%
Quality	PROJ1.3	Project Plan and Risk Management	10%
Quality	PROJ1.4	Project Team and Capacity to Deliver	10%

Evaluation of criteria

Non-Price 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: Score/Total Points available multiplied by 20 ($60/100 \times 20 = 12$)

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

Example if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ($60/100 \times 10 = 6$)

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 selection 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. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score.

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

Your final score will $(60+60+40+40) \div 4 = 50$

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: $\text{Score}/\text{Total Points}$ multiplied by 50 $(80/100 \times 50 = 40)$

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

Section 6 – Evaluation questionnaire

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on completion of the questionnaire is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

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.
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool 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 Emptoris messaging system to raise any clarifications to our ITQ. You should note that typically 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 your customer is and what they want – a generic answer does not necessarily meet every customer'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 and concise contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do check and recheck your Bid before dispatch.

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

DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 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.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Customer to discuss your Bid. If your Bid requires clarification the Buyer will contact you.
- 7.16 Do not contact any UK SBS staff or Customer staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or Customer staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

Some additional guidance notes

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of UK SBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 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
- 7.33 Your bid will be valid for [modify duration if not 60 - 7.34 Bidders may only amend the Contract terms if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract and UK SBS fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.
- 7.35 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.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.

- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.38 Bidders should note that if they are successful with their proposal UK SBS reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks UK SBS may decline to proceed with the award of the Contract to the successful Bidder.
- 7.39 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 Emptoris.
- 7.40 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, UK SBS 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 UK SBS 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.

- 7.41 From 2nd April 2014 the Government is introducing its new Government Security Classifications (GSC) classification scheme to replace the current 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 from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

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

UK SBS 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

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)
- [Contracts Finder](#)
- [Tenders Electronic Daily](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)