



Invitation to submit a quote

in relation to consultancy services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing (Healthcare) 5G Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

Name of Customer: WM5G Limited

Issue date: 25 July 2019

Return date and time: midday (GMT) on 12 August 2019

Reference: D1083/DDA3/WP3

| | | |
|-----------------------------------|------------------------------------|-----------|
| 1 | Introduction and background | 3 |
| 2 | Description of services | 3 |
| 3 | Evaluation process | 3 |
| 4 | Timetable | 4 |
| 6 | Contract details | 5 |
| 7 | External communications | 5 |
| 8 | Specific requirements | 6 |
| 9 | FOI and data protection | 6 |
| 10 | Evaluation criteria | 6 |
| 11 | Response checklist | 8 |
| Appendix 1 – Specification | | 9 |
| Appendix 2 – Response | | 13 |

1 Introduction and background

- 1.1 WM5G Limited (the **Authority**) is issuing this invitation to submit a quote to parties interested in taking part in the procurement process for the appointment of a consultancy that will provide services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing Testbed.
- 1.2 This procurement concerns the award of a contract for consultancy services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands (the **Contract**) with the Authority.
- 1.3 This invitation to submit a quote contains important information regarding the intended procurement process for the Contract.
- 1.4 The Authority is a 'contracting authority' as defined in the Public Contracts Regulations 2015 (**PCR**). The funding envelope for this procurement is below the relevant OJEU levels and therefore this invitation to submit a quote is being undertaken outside the scope of the PCR.

2 Description of services

- 2.1 Details of the specification are set out at Appendix 1 below. The specification, which may be amended at the Authority's discretion, will form part of the Contract. All applicants should populate their response template (as set out at Appendix 2) based on the specification set out at Appendix 1.
- 2.2 All applicants are drawn to the provisions of the Transfer of Undertakings (Protection of Employment) Regulations 2006 (**TUPE**). It is the responsibility of applicants to procure their own advice as to whether or not TUPE applies to this procurement. Notwithstanding this, applicants should note that it is the view of the Authority that TUPE will not be applicable if this procurement exercise results in the Contract being awarded. Notwithstanding the foregoing, the Authority is not liable in any way for the opinion expressed above. If applicants have a contrary view to that stated above in relation to TUPE, applicants should notify the Authority of the same prior to the deadline to submit their response template.

3 Evaluation process

- 3.1 Responses to this invitation to submit a quote will be evaluated in accordance with the criteria set out at paragraph 10. Only responses that comply with this invitation to submit a quote will be evaluated.
- 3.2 Responses will be subject to an initial compliance check to ensure all relevant questions have been answered and all evidence has been included (where applicable). Where information is missing, an applicant may be rejected in which case its response will not be considered further. The Authority is under no obligation to clarify any missing information with an applicant unless, at its sole discretion, it considers it reasonable and appropriate to do so.
- 3.3 Following the initial compliance check, the Authority will evaluate the response in accordance with the evaluation criteria set out in paragraph 10.3.

4 Timetable

- 4.1 The following timetable is provided in guideline form only and is subject to change at the Authority's discretion:

| Stage | Date(s) |
|--|--|
| Deadline to submit a response to this invitation to submit a quote | Midday on Monday 12 th August |
| Notification of contract award | Week commencing 19 August 2019 |
| Contract go-live | Week commencing 26 August 2019 |

5 Instructions to applicants

- 5.1 Applicants must ensure that they submit a complete and accurate response to this invitation to submit a quote using the template set out in Appendix 2.
- 5.2 Applicants should answer all questions as accurately and concisely as possible. Answers should be clear and well-presented.
- 5.3 Responses and any additional sheets should be submitted as a PDF. All answers must be provided in the English language. Where the applicant wishes to submit translated documents, such documents must be certified translations.
- 5.4 At any time prior to the deadline for receipt of responses, the Authority may amend, add to or withdraw all or any part of this invitation to submit a quote. Any such amendments, additions, or removals will be notified to applicants via Contracts Finder.
- 5.5 **Responses, together with a copy of the applicant's most recent filed accounts, must be successfully submitted to the Authority by email to commercial@wm5g.org.uk by no later than midday (GMT) on 12 August 2019.** Please ensure that the email subject states 'Response to RFQ – D1083/DDA3/WP3'. Responses not received by the aforementioned deadline may not be considered by the Authority.
- 5.6 Any questions concerning this invitation to submit a quote should be submitted by email to commercial@wm5g.org.uk by no later than midday on 5 August 2019, quoting the reference 'D1083/DDA3/WP3' in the email subject. The Authority reserves the right not to respond to any questions or comments received after the deadline for clarification questions.
- 5.7 All responses must remain valid for a period of 90 days from the date of submission.
- 5.8 The Authority reserves the right to:
- 5.8.1 cancel or abandon this procurement exercise at any time at its entire discretion. The Authority accepts no liability for any losses caused by the cancellation or abandonment (or part thereof) of this procurement exercise nor any decision not to award the Contract; and/or

- 5.8.2 undertake further financial and/or technical due diligence against each applicant prior to entry into the Contract. Such due diligence may result in the Authority requesting that the applicant procures a parent company guarantee (where applicable) in favour of the Authority. Failure to provide to the Authority any information required for the purpose of undertaking this due diligence may lead to an applicant being eliminated from the procurement exercise; and/or
- 5.8.3 accept such part or parts of a tender as it decides, unless a tenderer expressly stipulates to the contrary at the time of submission of its initial tender.
- 5.9 The Authority reserves the right to disqualify any applicant if it becomes aware that the applicant did not qualify at the time of their response was submitted or that the applicant no longer qualifies, at any time before the formal entry into the Contract.
- 5.10 The Authority may require tenderers to demonstrate/present details or aspects of their tender submission to the Authority and their advisors for clarification purposes. Tenderers shall bear all costs and/or expenses incurred by tenderers associated with any such demonstration and/or presentation. Moreover, all applicants are responsible for all of their costs and expenses incurred in connection with this procurement process. Under no circumstances shall the Authority be liable for any costs or expenses borne by applicants.
- 5.11 No representation, warranty or undertaking, express or implied, is or will be given by the Authority or any of their agents or advisers with respect to the information contained in these instructions to applicants, including but not limited to with respect to its accuracy, adequacy or completeness.

6 Contract details

The successful tenderer will be required to enter in to the Contract for the services referred to in this document with the Authority. Further detail, including a draft or drafts of this Contract, will be provided following evaluation. The terms of the Contract will stipulate that the successful tenderer can raise an invoice on completion of the services /delivery of all the required deliverables.

7 External communications

- 7.1 Prior to entry into the Contract, applicants/tenderers must not, and must procure that its employees, officers, subcontractors, representatives, agents and/or advisors do not:
- 7.1.1 make any public statement or press release which is in any way connected to this procurement exercise or suggests/represents that there is a business relationship between the Authority and/or the applicant and/or tenderer; and
- 7.1.2 use any of the Authority's trademarks, logos or other intellectual property rights; and
- 7.1.3 undertake any action, or knowingly or negligently omit to do anything, which may bring the Authority into disrepute or embarrassment.
- 7.2 By submitting a response to this invitation to submit a quote, applicants acknowledge and agree to the restrictions set out at paragraph 7.1 above.

8 **Specific requirements**

Not applicable

9 **FOI and data protection**

FOI

9.1 Any information submitted to the Authority may need to be disclosed and/or published by the Authority pursuant to the Freedom of Information Act 2000. The Authority may disclose information in compliance with the Freedom of Information Act 2000, any other law, or, as a consequence of judicial order, or order by any court or tribunal.

9.2 If the applicant considers that any of the information included as part of their completed response is commercially sensitive then the applicant shall identify such part and explain what harm may result from disclosure and/or publication. Notwithstanding the foregoing, the Authority may still disclose such information where it is deemed necessary.

9.3 Submission by the applicant of any material marked 'confidential' or equivalent should not be taken to suggest that the Authority accept any duty of confidentiality by virtue of said marking.

9.4 The Authority reserves the right to publish its tender documents, contracts and data from invoices received and may, at its discretion, redact all or part of such information prior to publication.

Data Protection

9.5 The Contract will stipulate the respective roles of the Authority and the successful tenderer pursuant to the General Data Protection Regulation (2016/679) and Data Protection Act 2018. However, if the Authority is required to undertake a data protection impact assessment prior to award of the Contract, the applicant/tenderer may be required to support the Authority with such assessment.

10 **Evaluation criteria**

10.1 Responses will be subject to a two-stage evaluation process:

10.1.1 Stage 1 - Initial compliance check

10.1.2 Stage 2 - Suitability assessment

10.2 **Stage 1 - Initial compliance check**

10.2.1 Before responses are evaluated, the responses supplied will be subject to an initial compliance check to confirm:

(a) The response has been submitted on time, is completed correctly, is materially complete and meets the requirements of this invitation to submit a quote; and

(b) The response is sufficiently complete to enable it to be evaluated in accordance with this evaluation process.

- 10.2.2 Responses which do not satisfy paragraph 10.2 above may be rejected at this stage.

10.3 **Stage 2 - Suitability assessment**

- 10.3.1 Responses which successfully pass Stage 1 will be subject to an assessment in accordance with the evaluation criteria and weightings set out below. In the event that none of the responses are deemed satisfactory, the Authority reserves the right to consider alternative procurement options.

- 10.3.2 The evaluation is split into two parts as follows:

- (a) Part 1 – Price; and
- (b) Part 2 – Quality.

- 10.3.3 The weighting for the above is as follows:

- (a) Part 1 – (40%); and
- (b) Part 2 – (60%), divided into the following questions:
 - i Question 1 (20%) (2000 Words);
 - ii Question 2 (20%) (2000 Words); and
 - iii Question 3 (20%) (3000 Words).

- 10.3.4 Part 2 (questions 1 – 3) are qualitatively scored and the responses for each question will be marked with a score of 0 - 5 in accordance with the scale below:

| | |
|---------------------------|--|
| 5 – Excellent | meets all requirements set out, provides a detailed response and sound evidence. Response demonstrates a strong understanding of the requirements, for example. |
| 4 – Good | meets all requirements and provides a detailed response but lacks some evidence in minor areas, for example. |
| 3 – Adequate | meets most requirements, but lacks sufficient detail or evidence in some areas, for example. |
| 2 – Minor concerns | meets some requirements but with insufficient detail or unexplained gaps in key areas, does not fully answer the question posed and/or causes some concerns regarding ability, skills and/or understanding, for example. |
| 1 – Major concerns | meets very few requirements but with minor/no detail or unexplained gaps in several areas, does not answer the |

| | |
|----------------------------------|--|
| | question posed at all/in detail and/or causes grave concerns regarding ability, skills and/or understanding, for example. |
| 0 – Unacceptable response | no response received, or the response fails to address the question in the intended way/does not meet the minimum requirements/is non-complaint/does not provide any information that demonstrates that the applicant has the ability, skills and/or understanding, for example. |

10.4 Each member of the evaluation team will mark the responses to Part 2 (questions 1 – 3) individually and allocate scores. The scores for each question will be weighted in accordance with paragraph 10.3.3 above.

10.5 There are a total of 15 marks available for the scored questions. Once each score has been weighted in accordance with the percentage weightings, the weighted scores will be added together to identify the total score for that applicant.

10.6 Please note that any ancillary documents (such as PowerPoint slides or CVs) submitted with an applicant's response **will not** be reviewed or taken into consideration as part of the evaluation criteria. This paragraph does not however restrict applicants from responding to the qualitative questions set out in Appendix 2 on a separate sheet and providing this as an attachment as part of their response.

11 Response checklist

11.1 Applicants should review the table below before submitting the relevant documents via email to commercial@wm5g.org.uk. Please ensure that the email subject states 'Response to RFQ – D1083/DDA3/WP3':

| Document | Mandatory or optional submission | Format of document | Required file name |
|----------------------------|----------------------------------|--------------------|---------------------------------|
| Response | Mandatory | PDF | '001 Response – Applicant Name' |
| Most recent filed accounts | Mandatory | PDF | '002 Accounts – Applicant Name' |

Appendix 1 – Specification

This section sets out WM5G Limited's (**WM5G**) requirement for services.

WM5G Introduction

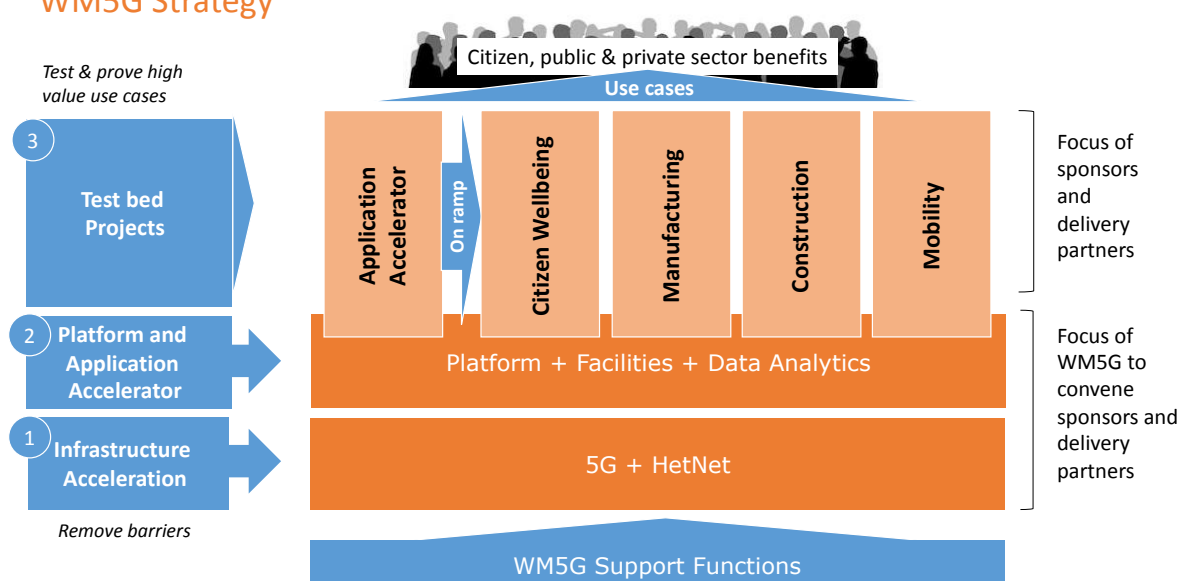
West Midlands Combined Authority (WMCA) successfully won the Department for Digital, Culture, Media & Sports (DCMS) competition to accelerate the roll out of 5G. This is an exciting project for the West Midlands region. WM5G is a new organisation, set up to deliver the strategy and further the aims of the WM5G Programme.

What is meant by '5G'? It is the next generation of mobile networks – significantly faster, reduced latency, greater reliability, flexible connectivity.

WM5G will be the UK's first region-wide 5G test bed, designed to achieve citizen, public and private sector benefits from 5G and hence accelerate 5G deployment across the region. WM5G is part of the DCMS 5G Test Beds and Trials Programme, which aims to accelerate deployment of 5G networks, ensure the UK can take early advantage of applications, maximise productivity and efficiency benefits to the UK from 5G, create new opportunities for UK businesses and encourage inward investment.

The diagram below outlines the strategy and scope of the programme:

WM5G Strategy



Urban Connected Communities background

The Urban Connected Communities (UCC) project is exploring how to deploy 5G effectively in an urban context, and the West Midlands was selected to run the largest and most ambitious of the UCC 5G trials. WM5G has established several vertical testbeds (projects) to focus on 5G delivery for these projects:

| | |
|-----------------------------|---|
| Infrastructure Acceleration | helping MNOs to deploy 5G in partnership with local authorities |
| Application Accelerator | helping end user organisation and technology companies to engage, explore and integrate with 5G and related technologies |
| Citizen Wellbeing Testbed | running use cases to support improved public service delivery for health, social care and the emergency services leading to improved efficiencies |
| Mobility testbed | use cases related to transport and travel in an urban environment |
| Manufacturing | use cases related to industrial processes and logistics |
| Construction | use cases covering construction design and build |

The Citizen Wellbeing project has completed initial planning and is now commencing delivery activity. One of the first actions will be working with the University Hospitals Birmingham (UHB), the primary sponsor for Citizen Wellbeing, to identify and perform an initial assessment of the use cases to be delivered over the lifetime of the project and suppliers who may want to partner with Citizen Wellbeing to deliver the use cases, generating external visibility and encouraging engagement.

Market engagement

This document is a request for quotes to run the three work packages of market engagement for the Citizen Wellbeing testbed within WM5G. For completeness, the three work packages being sourced as separate procurements are:

1. Strategic data analysis
2. Use case development
3. Market engagement process

We would welcome bidders to provide responses covering any combination or all three work packages given the dependencies and information sharing potential. If one bidder intends to bid for all three opportunities then they need to submit three separate bids.

Scope of work: (WP3) Market Engagement Process

WM5G is seeking consultancy services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing testbed. This will involve working with WM5G and staff at University Hospitals Birmingham (UHB) and their partners (e.g. Birmingham City Council, West Midlands Ambulance Service) including clinicians, information technology, informatics and other professionals to deliver a work package focused around running a Market Engagement Process. This third work package should interact with the first and second work packages comprising Strategic Data Analysis and Use Case Development as we expect there to be synergies across them.

WM5G is creating a new marketplace for the delivery of 5G related products and services. A Market Engagement Process is required to stimulate the supply-side. This will be delivered by facilitating market activities to publicise the ambitions of the Citizen Wellbeing testbed and its use of 5G, leading to an understanding of the market's current and future position to respond to the requirements detailed in this document.

The activities for the market engagement process should include two main elements: bring together existing knowledge; and, understand and stimulate industry supply. For example, some of the areas that should be considered are as follows:

Bring together existing knowledge

- Support the WM5G team to consult with the other UK 5G testbeds to understand success and capture lessons learned;
- Bring evidence from the rest of the UK and worldwide, of cutting-edge applications for 5G, and access to a network of leading health and technology providers;
- Use your sector knowledge and expertise to contribute to WM5G's efforts to develop a market prospectus;
- Use the outputs from the market engagement and your existing market knowledge to validate and confirm WM5G's sourcing approach.

Understand and stimulate industry supply

- Use a structured interview process to be consistent in approach when gauging supplier interest to participate with WM5G for partnering and match-funding;
- Meet with industry bodies and facilitate industry workshops to discuss WM5G's needs and allow industry representatives to explain how the industry works, present possible solutions and provide contacts for relevant suppliers;
- Call several show-and-tell sessions to allow suppliers to explain their proposed solutions;
- Bring access to your supplier network, and where necessary develop new contacts within industry leaders for the health and social care domains, potentially leading to investment in the Citizen Wellbeing testbed;
- Meet with a group of key suppliers, or a range of suppliers individually, where WM5G can discuss and define its needs and suppliers can provide information about their products and services;
- Run industry workshops;
- Promote supplier networking.

The team running work package three (Market Engagement Process) will need to work with the teams delivering work packages one and two (Strategic Data Analysis and Use Case Development, respectively) as there will be synergies across these areas. We think that work packages one, two and three could be run simultaneously as we anticipate there will be significant interaction and iteration between the teams. In your response, we would like to see how you will facilitate this.

Completing this work package should provide an opportunity to work using a flexible methodology to refine the Use Case Development process (work package two) and promote supplier networking by encouraging meetings between potential suppliers allowing them to network, potentially enabling joint proposal, partnering arrangements or subcontracting opportunities.

We welcome proposals for the best way to run the Market Engagement Process.

WM5G requires a fixed price to deliver the requirements set out within the specification. Fixed prices should include any disbursements and expenses.

We envisage this work package to be priced at a maximum of £85,000.

Please provide your fixed price within the pricing area in Appendix 2. Within your returned response, please also provide a breakdown of how you arrived at your fixed price. The breakdown should include details of hourly rates and details of key personnel and hours allocated to the key milestones set out within the provided specification

We welcome proposals for the best way to run this work package, and any ideas to enhance the scope of work.

Timeline

The timeline for this work is anticipated to be from the 27th August to 30th September 2019 (inclusive), by when all deliverables must have been received by WM5G for approval.

Location

We may be able to provide a hot desk (not bookable or guaranteed) in Birmingham in either WM5G's offices / our sponsors location but this should not be assumed. Your response to Part 2, Question 3 of Appendix 2 should identify how you will ensure this will not impact on the deliverables required.

Appendix 2 – Response

Dear WM5G Limited,

Invitation to submit a quote in relation to consultancy services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

(Reference: D1083/DDA3/WP3)

We refer to your invitation to submit a quote in relation to consultancy services to support market engagement activities relating to the Market Engagement Process within the Citizen Wellbeing Testbed, as part of the Urban Connected Communities (UCC) Project in the West Midlands.

Please find our response below.

Weightings:

Price (40%)

Quality (60%)

Response:

Part 1 - Fixed price (40%):

| | |
|-------------------------------|--|
| Name of applicant: | (Please complete) |
| Contact details of applicant: | (Please complete) |
| Confirmation of Fixed Price: | (Please complete), exclusive of VAT but inclusive of disbursements and expenses. |
| Breakdown: | (Please complete) |

Part 2 - Response to quality (60%):

| | |
|--|---|
| <p>Experience in Similar Projects (20%)</p> <p>Please demonstrate your experience of working on projects similar to the requirements set out within this request for quotation exercise. Within your response please provide specific examples of how you delivered the project and what the key outcomes were.</p> | <p>(Please complete)</p> <p>(Response should be limited to 2,000 words and an attachment is acceptable)</p> |
| <p>Ability to meet Timescales and Availability (20%)</p> <p>WM5G are working towards commencing on Tuesday 27th August 2019. Please can you provide confirmation of how you will work with us to achieve this milestone? Within your response please detail how soon you will be able to commence working with WM5G if you are successful and how you propose to work with up to another two external consultants (as referred to in the specification)?</p> | <p>(Please complete)</p> <p>(Response should be limited to 2,000 words and an attachment is acceptable)</p> |
| <p>Alignment with the requirements detailed in this document (20%)</p> <ul style="list-style-type: none"> • Please provide a comprehensive methodology and a detailed plan showing how the work activities will be delivered, along with how you intend to effectively manage the various stakeholder groups (e.g. WM5G, UHB, other) to get buy-in for this work. • Please provide details of how you could potentially enhance delivery beyond the specification in Appendix 1? • Please provide details of who will be working on this project if successful and details of their relevant experience? • Please confirm your proposed working arrangements in terms of your team's location? | <p>(Please complete)</p> <p>(Response should be limited to 3,000 words and an attachment is acceptable)</p> |

We also attach a copy of our most recent filed accounts as a PDF.

This response remains valid for a period of 90 days from the date stated above.

Yours faithfully

For and on behalf of:

Name of applicant:

Address of applicant:

Date: