**Selection Questionnaire (SQ) Project Brief – Marine Technical Services**

**SQ/ITT/Contract information:**

**Route to Market:** Restricted Procedure

**Expected commencement date:** November/December 2024

**Contract length:** 4 years

**Contract form:** Framework

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

**ITT Documents:** To follow shortly.

**Attachments to the SQ for supplier completion**: “TCE Marine Technical Services Lots- SQ Response” (excel)

**Introduction**

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

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

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

**Sections within this SQ**

1. Background to The Crown Estate
2. Background to this SQ
3. Responding to the SQ
4. SQ Evaluation Criteria & Evaluation Example
5. Indicative SQ Timeline
6. Portal
7. Communications Protocol
8. Confidentiality
9. Freedom of Information
10. Final Decision and Award
11. **Background to The Crown Estate**

Dating back more than 260 years, The Crown Estate is a unique business with a diverse portfolio. We actively own and manage land and the seabed around England, Wales, and Northern Ireland. The Crown Estate was established by an Act of Parliament in 1961. As an independent commercial business, we are tasked with generating profit for the Treasury for the benefit of the nation’s finances. This has totalled £4bn over the last 10 years.

Our Marine business is one of a group of four strategic business units which also includes London, Regional and Windsor.

As the manager of the seabed around England, Wales, and Northern Ireland, we play a key role in the UK’s offshore renewable energy, cables, pipelines, CO2 storage and marine aggregates sectors. We work in partnership with our customers and stakeholders to help the country optimise the economic, environmental, and social potential of the marine environment, supporting its long-term sustainable development.

**Purpose, values and corporate strategy**

Our purpose is to create lasting and shared prosperity for the nation. This intersects with what the world around us needs and where we believe we can contribute. It sets out our ambition and the meaningful role we want to play beyond our return of profit to Treasury.

Our purpose ensures that we deliver social and environmental value alongside financial return. We believe our role is to add real value today while also creating something better for future generations – some of our endeavours will be specifically for the long term.

Our corporate strategy is for The Crown Estate to be a leader in supporting the UK towards a net zero carbon future and to take a leading role in stewarding the UKs natural environment and biodiversity. Our Marine strategy sets out an ambitious programme to de-risk, optimise and accelerate the development of the seabed. We have an important role to play to catalyse the UK towards a net zero future, delivering a thriving marine environment and bridging the gaps between sectors.

Our values define our culture and guide our behaviours, they also tell our stakeholders, partners, and customers how we do business and what they can expect from us:

**Caring**: We are committed to looking after the world around us and each other. That’s why we are stewards: we seek to take care of people, reflect on our actions, and carefully consider long-term impacts. To leave a positive legacy for generations to come, we treat people, places and the environment with the care and respect they need to thrive.

**Together**: We work together and with others to deliver on our purpose. That’s why we focus on building strong collaborative relationships with our customers, stakeholders, and communities. To build trust, we focus on understanding the real needs of those around us.

**Creative**: We believe that creativity enables us to unlock new ideas and solve problems. That’s why we strive for an inclusive culture where diverse perspectives and approaches are encouraged. To be a true catalyst for change, we embrace original thinking and the best ideas.

**Impactful**: We believe that positive impact and financial performance must go hand in hand. That’s why we challenge ourselves to deliver the key social, environmental, and financial factors that underpin prosperity. In always striving to add value, we ask ourselves how our actions align with our purpose and make a meaningful difference.

You can read more about these in our Annual Report: [Annual Report 2023/24 | The Crown Estate](https://www.thecrownestate.co.uk/about-us/annual-report)

1. **Background to this SQ**

The Crown Estate is seeking to appoint multiple suppliers to provide Technical Services covering a range of sectors and disciplines, each of which forms a ‘Lot’ within this SQ/ITT:

1. Offshore Wind
2. Marine Energy (Wave, Tidal Stream, Tidal Range)
3. Transmission (Export Systems & Interconnectors)
4. Telecoms & Pipelines
5. Carbon Capture & Storage & H2
6. Aggregates & Minerals
7. Environment and Ecology
8. Decommissioning
9. Energy System
10. Sustainability

Across this range of sectors and disciplines, we undertake activities such as surveying, technical characterisation, resource assessment, spatial planning, engineering design, asset management, research & development and stakeholder engagement. Each of these areas requires access to specialist resource to advise and support our in-house technical experts.

The full list of capabilities and services within each Lot are stated in the “TCE Marine Technical Services Lots- SQ Response” excel attached to this SQ. We will appoint suppliers who can deliver excellent service, maintain business alignment, manage costs proactively and efficiently and deliver service and outputs to agreed timelines.

The supplier will be responsible for providing targeted technical advice and guidance to ensure the delivery of a reliable set of outcomes through a robust and defensible process which will ultimately inform key milestones and decisions in Marine. In particular, The Crown Estate has announced an intention to award 20-30GW additional seabed rights for offshore wind, now connected to our recently announced partnership with Great British Energy. We have a particular focus on identifying a Technical Advisor, through this tender process, to support the engineering and survey support requirements associated with the future offshore wind leasing activity.

1. **Responding to the SQ**
   1. The document “TCE Marine Technical Services Lots- SQ Response” contains detailed instructions on how to respond to this SQ. Please ensure this document is completed thoroughly and accurately. Failure to do so may result in being withdrawn from the SQ process.
   2. Suppliers are invited to respond to any number of the ten Lots.
   3. There shall be a clarification window for suppliers to ask clarification questions regarding the SQ, please see the ‘SQ Indictive Timetable’ for specific dates. All questions should be communicated via the Portal, see ‘Communications Protocol’ for full details.
   4. The specific type of services will be specified further at ITT stage.
2. **SQ Evaluation**

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

1. Firstly, the standard SQ questions which will be assessed on a pass/fail basis, based on whether the correct and complete information has been provided. **Should suppliers fail on any of the standard questions, they will be excluded.**
2. Secondly, against each Lot, suppliers’ capabilities and experience will be assessed, this is captured in Part 3, Section 7 of the SQ, in doc: TCE Marine Technical Services Lots- SQ Response. Each Lot response will be individually scored (scored 0-5 – see Table one). **Should suppliers fail to achieve a score of 3 or higher on both the Capabilities and Services sections, they will be excluded from that Lot.**
3. Thirdly, each supplier’s final score for each Lot will be calculated by averaging together the Capability and Services scores with the weightings as specified in column E. (e.g. in Lot 1, if a supplier receives a score of 3 for Capabilities and 4 for Services, then their final score will be 3.5).
   1. Suppliers will then be ranked by final score and the successful suppliers within each Lot will be determined based on (i) highest scoring and (ii) ensuring adequate coverage of capabilities and services across all Lots, for example, if there were one or more capabilities or services in a single Lot and none of highest ranking suppliers have provided satisfactory evidence for, but lower ranked suppliers were able to provide satisfactory evidence, the highest ranking of these other suppliers would also be progressed to ITT to ensure all Lot capabilities and services could be provided by the suppliers brought to ITT. A maximum of 10 suppliers will be progressed to ITT within each Lot.

**Table one – Scoring Criteria**

|  |  |
| --- | --- |
| **Scoring 0-5** | **Scoring Criteria** |
| **0** | (**No response**) Failure to submit evidence on capabilities/services. |
| **1** | (**Poor response**) The response provides **weak** evidence that supplier can meet **at least one** capability/service. |
| **2** | (**Weak response**) The response provides **satisfactory** evidence that supplier can meet **at least one** capability/service.         OR  **Weak** evidence that supplier can meet **most** capabilities/services. |
| **3** | (**Satisfactory response**) The response provides **strong** evidence that supplier can meet **at least one** capability/service         OR  **Satisfactory** evidence that supplier can meet **most** capabilities/services |
| **4** | (**Good response**) The response provides **strong** evidence that supplier can meet **most** capabilities/services         OR  **Satisfactory** evidence that supplier can meet **all** capabilities/services. |
| **5** | (**Excellent response**) The response provides **strong** evidence that supplier can meet **all** capabilities. |

1. **Indicative SQ Timeline**

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

| Activity | Dates |
| --- | --- |
| Publication of Supplier Questionnaire/ Find a Tender Notice/ Contracts Finder Notice | 8th August 2024 |
| Clarification Question Deadline | 21st August 2024 |
| Submission of Supplier Responses to SQ | 12pm on 9th September 2024 |
| Review and Evaluation of SQ responses to be completed | 27th September 2024 |
| Suppliers to be notified if they will be invited to the ITT | By 30th September 2024 |
| Publication of ITT/ Find a Tender Notice/ Contracts Finder Notice | 1st October 2024 |

1. **Portal**

6.1 All tender documents will be made available via the Tender Portal.

6.2 Suppliers are instructed not to include in their response anything other than the requested documents. Marketing material will be discarded and will not be read.

6.3 Suppliers are required to submit their completed Tenders through the Tender Portal. Suppliers are advised to complete their Tenders in advance of the Submission Deadline to allow time to understand and incorporate the responses to any clarifications that have been requested. It is the responsibility of Suppliers to ensure they are familiar with the system and allow sufficient time for finalising and submitting their Tenders.

6.4 The Crown Estate is not responsible for inaccurate or incomplete contact information input into the Tender Portal by Suppliers. It is the responsibility of a Supplier to ensure that the contact information they have entered for their organisation on the Tender Portal is accurate and kept up to date. Important notification messages relevant to this procurement may not be received by a Supplier should the contact information be inaccurate. If at any stage a Supplier needs to update the contact information held for their organisation this can be achieved by submitting it via the Tender Portal. The Crown Estate is under no obligation to respond/follow up on ‘out of the office’ responses received from a Supplier and so Suppliers will need to make appropriate arrangements to deal with absences. For any technical advice or assistance relating to the Tender Portal if for any reason the Tender Portal is not available, please contact the Tender Portal helpdesk between 8.00am and 6.00pm Monday to Friday on 0800 069 8620 (or +442036084013 if outside the UK) or email [[help@SourceDogg.com](mailto:help@SourceDogg.com)]. This email address should only be used where there are technical issues with the Tender Portal. Otherwise, all questions and queries relating to this procurement should be submitted via the Tender Portal.

6.5 The Supplier is not permitted to return by email, or by any means other than via the Tender Portal, any part of the Tender. Any attempt to email, or return otherwise than via the Tender Portal, any part of the Tender may result in the Tender being excluded.

6.6 All Tenders must be submitted via the Tender Portal by the Submission Deadline unless alternative tender submission instructions are stated. Suppliers are advised to allow plenty of time to submit their completed Tenders onto the Tender Portal as this will take some time to complete and The Crown Estate will not accept any documents, including any completed Tenders that are submitted after the Deadline.

6.7 All Forms of Tender must remain valid and open for acceptance by The Crown Estate for a period of ninety (90) calendar days from the Submission Deadline.

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

**8. Consortia**

8.1 Where a consortium is proposed, all members of the consortium will be required to provide the information required in all sections of the ITT as part of a single composite response. Responses must enable The Crown Estate to assess the overall provision of Services proposed. The evaluation will take place on the information from the Lead Member.

8.2 Where the Lead Member is a special purpose vehicle or holding company, information should be provided of the extent to which it will call upon the resources and expertise of its members.

8.3 Where a consortium or other grouping of economic operators is proposed each member of the consortium (or grouping) shall provide a written undertaking addressed to The Crown Estate that it, together with the other members, shall make available to the consortium (or grouping) the resources necessary to perform the contract. Where such an undertaking is not received the Tender shall be considered failed and excluded from further consideration.

8.4 The Crown Estate recognises that arrangements in relation to the consortia may be subject to future change. Suppliers should therefore respond in the light of such arrangements as are currently envisaged. Suppliers are reminded that The Crown Estate must be immediately notified of any changes, or proposed changes, in relation to the bidding model so that a further assessment can be carried out by applying the selection criteria to the new information provided. Any change in consortium membership may lead to subsequent exclusion from the tender process. The Crown Estate also reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of any updated information supplied. Such assessment being carried out in line with the evaluation criteria and methodology identified.

8.6 Where Suppliers are proposing to create a separate legal entity, such as a special purpose vehicle, Suppliers should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity.

**9. Sub-contracting**

9.1 Where the Supplier proposes to use one (1) or more sub-contractors to deliver some or all of the contract requirements, they should provide details of the proposed bidding model that includes members of the supply chain and the percentage of work proposed to be delivered by each sub-contractor.

9.2 The Crown Estate recognises that arrangements in relation to sub-contracting may be subject to future change and may not be finalised until a later date. However, Suppliers should be aware that where information provided to The Crown Estate indicates that sub-contractors are to play a significant role in delivery, any changes to those sub-contracting arrangements may affect the ability of the Supplier to proceed with the procurement process or to provide the supplies and/or Services required. Suppliers should therefore notify The Crown Estate immediately of any change in the proposed sub-contractor arrangements. The Crown Estate reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of the updated information. Such assessment to be done in line with the Evaluation Criteria and Methodology as laid out.

**10. Confidentiality**

* 1. Suppliers may only make use of any information provided by The Crown Estate relating to or in connection with this procurement for the purposes of preparing and submitting their Tender. Suppliers shall not, without the prior written consent of The Crown Estate, at any time make use of such information for any other purpose or disclose such information to any person, except:

(a) where the disclosure is required by law or any court, regulatory or government authority competent to require the same;

b) to the extent where such information is brought within the public domain otherwise than by the breach of this paragraph 10.1 by the relevant Supplier; or

(c) where such information is disclosed for the purposes of obtaining sign-off from insurers and legal advisers on the Contract, or for obtaining sureties, guarantees or commitments from proposed sub-contractors or suppliers and other information required to be submitted with their Tender.

* 1. Suppliers must treat this SQ (and all the documents forming part of or appended or scheduled to this ITT) and all other information provided by or on behalf of The Crown Estate as private and confidential (and shall procure that their employees, consultants, subcontractors, advisers, insurers and funders shall treat documentation supplied in relation to this ITT as confidential). No Supplier shall disclose that it has been invited to submit a Tender to The Crown Estate or release details of this ITT (and all the documents forming part of or appended or scheduled to this ITT) other than on a strictly confidential basis and to the extent strictly necessary to such parties as the Supplier needs to consult in order to submit a Tender.
  2. Suppliers shall not at any time release any information concerning the ITT and/or their Tender and/or any related documents and/or discussion with The Crown Estate in connection to this procurement for publication in the press or on radio, television, screen or any other medium.
  3. This ITT is issued in confidence and remains the property of The Crown Estate. The copyright in this ITT is vested in The Crown Estate and may not be reproduced, copied or stored on any medium without the prior consent of The Crown Estate except in relation to the preparation of the Tender.

1. **Conflicts of interest**
   1. The Crown Estate may exclude any Supplier if there is an actual and/or potential conflict of interest which cannot be effectively remedied. The concept of a conflict of interest as set out in Regulation 24 of the Regulations, includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
   2. Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform The Crown Estate and provide details of the actual or potential conflict(s) and any measures taken or to be taken to remedy the actual or potential conflict(s).
2. **Freedom of Information** 
   1. Suppliers are to note that The Crown Estate is subject to the Freedom of Information Act 2000 (the FOIA) and the Environmental Information Regulations 2004 (the EIR). Under the FOIA and EIR, members of the public or any interested party may make a request for information held by The Crown Estate at the time of the request.
   2. Following such a request, The Crown Estate will consider the disclosure of any relevant information, including price quotes, contained in Tenders both successful and unsuccessful, subject to the exemptions of the FOIA or EIR as applicable. Suppliers should be aware that attaching a blanket label of ‘private and confidential’, 'commercially confidential' or similar to Tenders may not exempt those Tenders from disclosure under the FOIA/EIR.
   3. If a Supplier considers that all or any part of its Tender and/or any specific information contained therein constitute a “trade secret”, or that the Tender or information is commercially sensitive information disclosure of which would be likely to prejudice the commercial interests of any party, believes that a duty of confidentiality applies or otherwise considers that such documents and/or information falls within any other exemption set out in the FOIA/EIR, the Supplier should:
3. attach information it considers to be commercially sensitive e.g. costing or trade secrets in a separate Annex 4 Schedule of Confidential Information marked ‘commercially sensitive information’ or ‘trade secret’ and include a time limit for the sensitivity of the information; and
4. in respect of such schedule and/or specific information, identify the particular exemption that the Supplier considers should apply in the particular circumstances.

12.4 For the avoidance of doubt, Annex 4 of this ITT is a mandatory document which must be submitted to the Tender Portal. If a Supplier considers that its Tender and/or specific information contained therein does not constitute a “trade secret” or commercially sensitive information as described at paragraph 2.54 above, the Supplier is still required to submit Annex 4 and will need to mark table 2 as “not applicable”.

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

1. **Final decision and Approval**

13.1 The Crown Estate reserves the right to clarify a Supplier's SQ response at any point during the evaluation process and will do this by communicating with the Supplier concerned via the Tender Portal.

13.2 The Suppliers acknowledge and agree that the requirements set out in the SQ continue to apply throughout the Procurement and, if successful, into the Contract duration. With that in mind, prior to contract award and prior to entering into the Contracts (and at any other reasonable time throughout the Procurement), The Crown Estate reserves the right to request any information from a Supplier to ensure its continued compliance with the SQ criteria, including (but not limited to) evidence of the Supplier's economic and financial standing.