

Selection Questionnaire (SQ) Project Brief – Leasing Technical Advisor

SQ/ITT/Contract information:

Route to Market: Restricted Procedure

Expected commencement date: June/July 2025

Contract length: 3 years + 1 year optional extension

Contract form: Framework

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

ITT Documents: To follow

Attachments to this SQ Project Brief:

For supplier completion:

Attachment A) Supplier SQ Response Document- Leasing Technical Advisor (excel)

For supplier information:

Attachment B) Draft Tender Documentation List (excel)

Attachment C) Pre-Market Engagement- Q&A (pdf)

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. Summary and Statement of Requirement (SoR)
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

1. 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 UK's 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](#)

2. Summary and Statement of Requirement (SoR)

The Leasing technical Advisor is responsible for advising The Crown Estate (TCE) in relation to all the technical aspects of the Future Offshore Wind (FOSW Leasing, "the programme") tender process.

The Leasing technical Advisor is engaged to support TCE throughout the following main phases of the future tender rounds and estimated high level timeline:

- 1. Definition Phase**
- 2. Design & Build Phase**
- 3. Delivery Phase (PQQ & ITT)**
- 4. Closure Phase**

The detailed work scopes for each tender phase and for the market assessment are included below. Throughout the duration of the tender process, TCE may request other support or deliverables in addition to the tasks and deliverables listed.

The Leasing technical Advisor shall work in close cooperation with TCE and its other advisors to deliver the tasks and documentation as detailed below. Time and resources for regular communication, coordination and interface management are deemed to be included in the Leasing technical Advisor's scope of work.

In addition to the above, The Leasing technical Advisor may be required to perform ad hoc tasks to provide TCE with technical advice on matters that may arise in relation to the entry into Legal Agreements process. Detailed scope of works for such support shall be agreed with TCE as required.

Leasing Technical Advisor Statement of Requirements (SoR)

Definition Phase

- 1.1.1. From a technical/engineering perspective, stress-test the deliverability of the TCE FOSW Programme Objectives and the Leasing Objectives through the TCE proposed leasing tender approach (with support from other advisers) and advise on any amendments considered necessary to deliver the objectives;
- 1.1.2. Review and stress-test the internal Gate Entry documents produced by TCE during the Definition Phase to move to the subsequent Design & Build Phase and advise on any proposed amendments and improvements. Deliver necessary input, contribute to drafting project deliverables (see Table 1 below)
- 1.1.3. Identify alternative solutions for the e-tendering software and recommend best solution in terms of key criteria (user friendly (for TCE and for bidders), safe and secure, easy to implement (with appropriate customer support throughout project), capable of implementing within the FOSW Leasing project timeline, cost-efficient)
- 1.1.4. Assist with market engagement activities where appropriate.

Table 1- List of internal Gate Entry documentation- Definition Phase

Document No	Title	Content summary	External support
00985-43452-01-162-GOV	Programme Objectives	Overall objectives of the Future Offshore Wind Programme	TBC
00985-43453-02-16-GOV	Leasing Objectives	Specific objectives of the Future Offshore Wind Leasing Project	TBC
00985-43452-01-102-GOV	Toolbox (part only)	Detailed risk log, issues and assumptions; Lessons learned	TBC
00985-43453-01-109-REP	Definition Phase Report for Gate Entry	An exec summary of the appendices, including: <ul style="list-style-type: none"> • Areas to be screened through HRA; • Bidder Profile Policy; • Tender Parameters; • Project Characteristics; • T&D Policy; • PQQ & ITT Criteria. 	TBC
00985-43452-01-156-GOV	Schedule	Incl. High- level plan for the following phases, detailed	TBC

		plan & dependencies for Design & Build Phase	
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2. Design & Build Phase

TCE intends to use the FLOW – Leasing Round 5 documents as the starting templates for the Design & Build phase tender documents and deliverables for the FOSW. This approach ensures that:

- Existing (LR5) processes, documents and policy can be re-used to make efficient use of available resources and achieve the strict timeline targets of the FOSW Leasing;
- New/unknown risks are avoided;
- Consistency across leasing rounds is maintained to give confidence to market and stakeholders;
- Therefore, whilst delivering their work scopes, the Leasing technical Advisor is required to adopt the following principles: Assess suitability of Round 5 Technical Documentation (see Appendix 1: List of R5 tender documents), ensuring that LR5 design works with and adapt/adjust as necessary to FOSW Leasing structure;
- Check that LR5 design does not inhibit the achieving of the FOSW Programme Objectives nor the Leasing Objectives.

If major departures from the LR5 positions or documentation are envisaged or proposed by the Leasing technical Advisor, these shall be discussed and agreed with TCE prior to implementation.

2.1. Tender Design

2.1.1. Support development of PQQ, ITT1 and ITT2 objectives.

- 2.1.2. Advise TCE on technical tender parameters and be responsible for drafting that design in a form that can be lifted directly into the PQQ and ITT documentation;
- 2.1.3. Work with TCE to identify any amendments required to the design of the tender process as required following technical review;
- 2.1.4. Project manage work order and complementary work orders being undertaken on the same timeframe including attending project updates and workshops, reporting and co-ordination of project activities.

2.2. Bidder-facing and Internal Evaluation Documentation Build

- 2.2.1. Based on TCE precedents, lead development of and draft the technical questions and evaluation criteria for PQQ and ITT stages (bidder-facing), in close collaboration and alignment with the commercial and legal criteria;
- 2.2.2. Review and provide input to support the Commercial Advisor to generate their questions and evaluation criteria (as required);
- 2.2.3. Develop and draft PQQ and ITT technical evaluation and scoring guidelines (for evaluator's/ moderator's use);
- 2.2.4. From a technical perspective, review relevant sections of PQQ and ITT bidder facing and internal evaluation documentation for overall consistency;

- 2.2.5. If required, support the Commercial Advisor road test/stress test of the documentation ahead of issue;
- 2.2.6. Assist with market engagement activities where appropriate.

The preliminary list of deliverables for the Design & Build Phase of the tender for each of the FOSW rounds is provided in **Appendix 1: Draft Tender Documentation List**. The list and lead for each document may be subject to change during the tender process, based also on advice from the Leasing Technical Advisor, the Commercial Advisor and/or the Sustainability & Supply Chain Advisor, and subject to mutual agreement with the TCE.

2.3. Tool Build

- 2.3.1. Support the development of tender architecture (including PQQ and ITT process design) of the e-tendering bidder facing system, in conjunction with the appointed e-portal provider];
- 2.3.2. Provide technical input into the e-tendering system;
- 2.3.3. Support the development of tender assessment architecture (including PQQ and ITT stages) of the evaluation software, in conjunction with the appointed evaluation software provider];
- 2.3.4. Review and sign-off the tool build (technical aspects)

3. Delivery Phase

- 3.1.1. Support TCE in the execution of the leasing tender process (leading to the award of rights);
- 3.1.2. Manage technical pre-bid submission clarifications (PQQ and ITT stages), documenting all responses and liaising with other advisors as necessary;
- 3.1.3. Provide the technical evaluator and moderator teams and provide them with the necessary training;
- 3.1.4. Evaluate and moderate the technical sections of PQQ and ITT returns in accordance with the agreed documentation including assessing compliance with threshold criteria;
- 3.1.5. During the evaluation phase, the evaluators shall address questions and/or escalate issues to the moderators who in turn shall be responsible for liaising with TCE and/or seeking counsel from the Legal Advisor as required to resolve the queries and issues raised;
- 3.1.6. Provide technical evaluation reports on each bidder (relevant sections) - (PQQ and ITT stages);
- 3.1.7. Support bid clarifications;
- 3.1.8. Support appeal process and responses (if required);
- 3.1.9. Support unsuccessful bidder debriefings (if required);
- 3.1.10. Participating to post-evaluation review/lessons learned exercise as appropriate.

4. Closure Phase

- 4.1.1. Support the development of stage gate reports required for internal gate approvals for Design & Build;

- 4.1.2. For each stage and at the end of the Future Offshore Wind Leasing Project, produce reports with technical lessons learned and present findings to TCE;
- 4.1.3. For each stage and at the end of the FOSW Programme, contribute to report with overall lessons learned and present findings to TCE;
- 4.1.4. Deliver a final closeout and handover report.

We expect the main part of the Leasing technical Advisor work scope to be concluded with the completion of ITT Stage 1, but further support may be required at later stages.

3. Responding to the SQ

- 3.1 The document “SQ Supplier Response Document- Leasing Technical Advisor” 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.
- 3.2 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.
- 3.3 The specific type of services will be specified further at ITT stage.

4. SQ Evaluation

The evaluation will be combination of standard SQ Questions (pass/fail) and questions specific to the Leasing Technical Advisory services in the SQ Supplier Response Document (pass/fail and scored, as outlined 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, in the SQ Supplier Response Document, there are two pass/fail questions, should suppliers fail on either of these questions, they will be excluded.
- 3. Thirdly, all other questions in the SQ Response Document will be scored on a scale of 0-5, seen in Table Two. Should suppliers receive a score of 2 or less after moderation and consensus scoring, in any of these questions, they will be excluded.
- 4. Lastly, suppliers will be ranked from the highest to lowest scoring after evaluations and The Crown Estate will select up to 10 of the highest-ranking suppliers to bring forward to ITT (Invitation to Tender) stage.

Table two – Scoring Criteria

Scoring 0-5	Scoring Criteria
0	(No response) Failure to submit evidence on capabilities/services.
1	(Poor response) The response provides poor evidence that supplier can meet the requirements of the question

2	(Weak response) The response provides weak evidence that supplier can meet the requirements of the questions
3	(Satisfactory response) The response provides satisfactory evidence that supplier can meet the requirements of the question.
4	(Good response) The response provides good evidence that supplier can meet the requirements of the question.
5	(Excellent response) The response provides excellent evidence that supplier can meet all requirements of the question.

5. Indicative SQ Timeline

Timeline for SQ process to ITT, this is indicative 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	17/02/2025
Clarification Question Deadline	28/02/2025
Submission of Supplier Responses to SQ	19/03/2025
Review and Evaluation of SQ responses to be completed	09/04/2025
Suppliers to be notified if they will be invited to the ITT	10/04/2025
Publication of ITT/ Find a Tender Notice/ Contracts Finder Notice	14/04/2025

6. 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]. 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.

7. Communications Protocol

- 7.1 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.
- 7.2 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.

- 7.3 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.
- 7.4 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.
- 7.5 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. Sub-contracting

- 8.1 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.
- 8.2 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.

9. Confidentiality

- 9.1 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.

9.2 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.

9.3 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.

9.4 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.

10 Conflicts of interest

10.1 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.

10.2 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).

11 Freedom of Information

11.1 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.

11.2 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.

- 11.3 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:
- a) 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
 - b) in respect of such schedule and/or specific information, identify the particular exemption that the Supplier considers should apply in the particular circumstances.
- 11.4 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”.
- 11.5 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.

12 Final decision and Approval

- 12.1 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.
- 12.2 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.