

# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of The Natural Environment  
Research Council (NERC)**

**Subject UK SBS FM17049 – Automatic Meter Reading System**

**Sourcing reference number – FM17049**

**UK Shared Business Services Ltd (UK SBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

Registered in England and Wales as a limited company. Company Number 6330639.  
Registered Office North Star House, North Star Avenue, Swindon, Wiltshire SN2 1FF  
VAT registration GB618 3673 25  
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**UKSBS**  
  
*Shared Business Services*

## Table of Contents

Section	Content
1	<a href="#">About UK Shared Business Services Ltd.</a>
2	<a href="#">About our Customer</a>
3	<a href="#">Working with UK Shared Business Services Ltd.</a>
4	<a href="#">Specification</a>
5	<a href="#">Evaluation model</a>
6	<a href="#">Evaluation questionnaire</a>
7	<a href="#">General Information</a>

## Appendix

1 –



Annex 1 - NERC  
Master List\_2017022:

2 –



Annex 2 - NERC  
Hardware Summary.z

3 –



Annex 3 - Meter  
Maintenance Charges

# 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, Energy and Industrial Strategy (BEIS) 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

Natural Environment Research Council (NERC)

NERC is the UK's main agency for funding and managing research, training and knowledge exchange in the environmental sciences.

NERC's work covers the full range of atmospheric, Earth, biological, terrestrial and aquatic science, from the deep oceans to the upper atmosphere and from the poles to the equator.

The organisation coordinates some of the world's most exciting research projects, tackling major issues such as climate change, environmental influences on human health, the genetic make-up of life on Earth, and much more.

Working internationally, NERC have bases at some of the most hostile places on the planet; running a fleet of research ships and aircraft and investing in satellite technology to monitor gradual environmental change on a global scale. NERC provide forewarning of, and solutions to, the key environmental challenges facing society.

Examples of funded research

- Showing the importance of mature tropical forests to the global climate.
- Developing a safer and cleaner way to mine gold by reducing the use of mercury.
- Studying the hole in the ozone layer - discovered by our British Antarctic Survey - and monitoring climate change.
- Playing a major role in the International Census of Marine Life that monitors our oceans.

NERC also runs six organisations of world renown:

- British Antarctic Survey, in Cambridge.
- British Geological Survey, in Nottingham.
- National Oceanography Centre, in Southampton.
- Centre for Ecology & Hydrology, in Oxfordshire.
- National Centre for Atmospheric Science, in Leeds.
- National Centre for Earth Observation, Swindon.

[www.nerc.ac.uk](http://www.nerc.ac.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	The Natural Environment Research Council Polaris House North Star Avenue Swindon SN2 1UH
3.2	Buyer name	James Hackett
3.3	Buyer contact details	<a href="mailto:FMProcurement@uksbs.co.uk">FMProcurement@uksbs.co.uk</a> 01793 867005
3.4	Estimated value of the Opportunity	£21,500 Per Annum Exclusive of VAT
3.5	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <a href="#">here</a>.</b> <b>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.</b>

### Section 3 - Timescales

3.6	Date of Issue of Contract Advert and location of original Advert	March 15 <sup>th</sup> 2017 Contracts Finder
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	17:00 March 31st 2017
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	17:00 April 4 <sup>th</sup> 2017
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	17:00 April 7 <sup>th</sup> 2017
3.10	Date/time Bidders should be available if face to face clarifications are required	April 11 <sup>th</sup> 2017
3.11	Dates Suppliers Should be available to attend interviews	April 26 <sup>th</sup> 2017
3.12	Anticipated rejection of unsuccessful Bids date	May 1 <sup>st</sup> 2017
3.13	Anticipated Award date	May 1 <sup>st</sup> 2017
3.14	Anticipated Contract Start date	May 8 <sup>th</sup> 2017
3.15	Anticipated Contract End date	April 30 <sup>th</sup> 2020 – dependant on extension
3.16	Bid Validity Period	90 Days

## Section 4 – Specification

### **TENDER FOR AUTOMATIC METER READING SYSTEM**

#### **Background Information**

The Natural Environment Research Council (NERC) is the UK's largest funder of independent environmental science, training and innovation, delivered through universities and research centres. There are four wholly owned research centres comprising British Antarctic Survey (BAS), British Geological Survey (BGS), Centre for Ecology & Hydrology (CEH) and the National Oceanography Centre (NOC) in addition to the NERC Head Office. The Original Automatic Meter Reading (AMR) system was installed in 2008 with secondary metering installed the following year. Extensive metering was primarily to monitor and manage the energy consumption across the organisation for the Carbon Reduction Commitment Energy Efficiency Scheme (CRC) and subsequently to assist with meeting the Green Government Commitment targets.

There are current 377 energy meters installed on the AMR system across 14 sites. Half-hourly +24 hours interval data for each monitoring point is accessed via a web portal with the data hosted by the data collection provider.

All AMR hardware is wholly owned by the NERC with the exception of main site HH electricity meters, gas meters and water meters, which are owned by the local utility provider. AMR logging equipment is attached to these meter points under agreement with the local provider. All historic data is hosted by the current provider but is the property of NERC and can be requested in CSV format at any termination of contract.

Reporting functionality includes but is not limited to:

Downloadable half-hourly data in csv format for all reporting points and as reporting sets  
Downloadable graphical reports over a range of time periods and including consideration for parameters such as occupancy, weather and location.

Automatic exception reporting to pre-determined email accounts

A summary list of data collection points can be found in annex 1

A summary of the installed hardware associated with the AMR system, including the data sheets for the common metering and logging equipment, can be found in Annex 2.

#### **Brief description of the Works**

Provision of:

- Transfer to data from the existing data collection provider
- Data collection services
- Data interpretation services via a web portal
- Schedule of rates for hardware maintenance and meter additions
- User support service and training provision
- Regular customer liaison and high level fault identification

## **Overview of Requirements**

The bidder is to provide the following services;

Transfer of new data on the existing contract to the new web portal, to be fully accessible to the client via a global login. Additional logins to be provided for up to 6 sub sets of the main data e.g. a login for the web portal for IT staff so that they can see the server room data points. This transfer to include for 1 day in-house training on the web portal, based at the NERC Swindon head office, for up to 10 users, inclusive of all training materials and site attendance (inclusive of travel and subsistence).

Data collection services for all points listed in annex 1

Data interpretation services via a web portal this to include half-hourly reporting for data in a visual format for, but not limited to:

- o Monthly consumption compared to same month previous year
- o Annual consumption compared to previous year
- o Exception Reporting
- o Fault reporting
- o Degree Days analysis
- o Carbon summaries
- o Summarised standard by floor area and occupancy

The contractor is to provide details of additional visual reports that can be utilised through their web portal, see quality questions. All data is to be available +24 hours and to be downloadable in csv format spreadsheets.

Availability of reporting sets and virtual meters at no extra cost.

A schedule of rates for hardware maintenance including but not limited to call out rates and standard rates for meter and logger replacement split on a per Centre basis.

A breakdown of the expected turnaround times on key site visits and new meter installs, see quality questionnaire.

A user support service and training provision, which includes an annual review of the meter and service provision between contractor and key NERC users. Combined training to be hosted for all Centres annually and to be provided in person by representative from the data collection at no extra cost. A dedicated email to be provided, for reporting of defects and to provide free guidance to users.

User manuals are to be provided for the web portal for key users. This is to be provided electronically and as 10 copies in hard copy.

Regular customer liaison and high level fault identification attending six monthly meetings, providing exception reporting at a monthly interval to the client.

## **General**

All bidders are required to hold valid public liability insurance for a minimum value of £10 million for the period of the contract; this is a precondition for all contractors undertaking works at NERC Centres.

Before working onsite contractors must have completed any site specific contractor induction forms and questionnaires

Risk assessments and method statements must be provided and signed off by the client before any site visit. This is to be provided to the client at least one working week before the start of work.

Note that all bidders are required to attend interview as part of this process

## **Price**

Contract to run for a period of 3 years, with an option for a 2 year extension at the same rates, however, this will be subject to an annual performance review in July/August each year for which the contractor will be required to attend site. The contract will initiate on 28th April 2017.

The fee will be expressed in the form of a lump sum fee inclusive of expenses for the following:

- Transfer of all data on all existing metering points to the new web portal – see annex 1 – including initial user training on transfer
- Data collection services for the 3 year period for all existing metering points
- Data reporting services for the 3 year period for all existing metering points
- Annual training provision
- Customer support services as detailed above

A further breakdown of costs is to be provided with an associated schedule of rates for maintenance and new meter additions on a per Centre basis, see annex 3. These prices are to be valid for the 3 year period of the contract and not subject to uplift.

Additional charges for aborted maintenance visits will not be accepted.

Centres will be invited to participate in a joint contract but due to governance changes Centres may choose to utilise this contract independently in future, for this reason prices on a per Centre basis have been requested.

## **Terms and Conditions**

Bidders are to note that any requested modifications to UK SBS Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

## 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 ( $5+5+6 = 16 \div 3 = 5.33$ ))

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
Price	AW5.3	Non-Negotiable Pricing
Price	AW5.5	E Invoicing
Price	AW5.6	Implementation of E-Invoicing
Quality	PROJ1.6	Standard Compliance
Quality	PROJ1.7	Health and Safety Compliance

Scoring criteria			
<b>Evaluation Justification Statement</b>			
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	50.00%
Quality	PROJ1.1	Method Statement	10.00%
Quality	PROJ1.2	Performance	10.00%
Quality	PROJ1.3	Summary of Services	10.00%
Interview	INT	Interview	20.00%

**Please note, Interview Questions will be made available to bidders individually, upon acceptance of a formal Interview Invitation.**

## 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: Score/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.ukpbs.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 90 days or your Bid will be rejected.
- 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](#)