

Invitation to Quote

**Invitation to Quote (ITQ) on behalf of Department for Business,
energy and Industrial Strategy**
**Subject: Feasibility study for testing for online price
personalisation in the UK**
Sourcing Reference Number: CR19037



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

Registered in England and Wales as a limited company. Company Number 6330639.
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VAT registration GB618 3673 25
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Version 3.6

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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for the Contracting Authorities 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 Contracting Authorities. This allows Contracting Authorities 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 the Department for Business, Energy & Industrial Strategy (BEIS), 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 Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

Privacy Statement

At UK Shared Business Services (UK SBS) we recognise and understand that your privacy is extremely important and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UK SBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.
- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

Privacy Notice

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the General Data Protection Regulation (GDPR).

YOUR DATA

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;
Names and contact details of employees proposed to be involved in delivery of the contract;
Names, contact details, age, qualifications and experience of employees whose CVs are submitted as part of the bid.

Purpose

The Contracting Authority are processing your personal data for the purposes of the tender exercise, or in the event of legal challenge to such tender exercise.

Legal basis of processing

The legal basis for processing your personal data is processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller, such as the exercise of a function of the Crown, a Minister of the Crown, or a government department; the exercise of a function conferred on a person by an enactment; the exercise of a function of either House of Parliament; or the administration of justice.

Recipients

Your personal data will be shared by us with other Government Departments or public authorities where necessary as part of the tender exercise. The Contracting Authority may share your data if required to do so by law, for example by court order or to prevent fraud or other crime.

Retention

All submissions in connection with this tender exercise will be retained for a period of (7) years from the date of contract expiry, unless the contract is entered into as a deed in which case it will be kept for a period of (12) years from the date of contract expiry.

YOUR RIGHTS

You have the right to request information about how your personal data are processed, and to request a copy of that personal data.

You have the right to request that any inaccuracies in your personal data are rectified without delay.

You have the right to request that any incomplete personal data are completed, including by means of a supplementary statement.

You have the right to request that your personal data are erased if there is no longer a justification for them to be processed.

You have the right in certain circumstances (for example, where accuracy is contested) to request that the processing of your personal data is restricted.

You have the right to object to the processing of your personal data where it is processed for direct marketing purposes.

You have the right to object to the processing of your personal data.

INTERNATIONAL TRANSFERS

Your personal data will not be processed outside the European Union

OR

COMPLAINTS

If you consider that your personal data has been misused or mishandled, you may make a complaint to the Information Commissioner, who is an independent regulator. The Information Commissioner can be contacted at:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF
0303 123 1113
casework@ico.org.uk

Any complaint to the Information Commissioner is without prejudice to your right to seek redress through the courts.

CONTACT DETAILS

The data controller for your personal data is:

The Department for Business, Energy & Industrial Strategy (BEIS)

You can contact the Data Protection Officer at:

BEIS Data Protection Officer, Department for Business, Energy and Industrial Strategy, 1 Victoria Street, London SW1H 0ET. Email: dataprotection@beis.gov.uk.

Section 2 – About the Contracting Authority

Department for Business, Energy & Industrial Strategy (BEIS)

The Department for Business, Energy and Industrial Strategy (BEIS) was created as a result of a merger between the Department of Energy and Climate Change (DECC) and the Department for Business, Innovation and Skills (BIS), as part of the Machinery of Government (MoG) changes in July 2016.

The Department is responsible for:

- developing and delivering a comprehensive industrial strategy and leading the government's relationship with business;
- ensuring that the country has secure energy supplies that are reliable, affordable and clean;
- ensuring the UK remains at the leading edge of science, research and innovation; and
- tackling climate change.

BEIS is a ministerial department, supported by 46 agencies and public bodies.

We have around 2,500 staff working for BEIS. Our partner organisations include 9 executive agencies employing around 14,500 staff.

<http://www.beis.gov.uk>

Section 3 - Working with the Contracting Authority.

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	Contracting Authority Name and address	Department for Business, Energy and Industrial Strategy 1 Victoria street, Lodnon, SW1H 0ET
3.2	Buyer name	Alexandra Richards
3.3	Buyer contact details	Research@uksbs.co.uk
3.4	Indicative value of the Opportunity	£40,000.00 Excluding VAT
3.5	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available here. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	Tuesday 21 st May 2019 Contacts Finder
3.7	Latest date/time ITQ clarification questions shall be received through Emptoris messaging system	Thursday 13 th June 2019 11:00am
3.8	Latest date/time ITQ clarification answers should be sent to all Bidders by the Buyer through Emptoris	Friday 14 th June 2019
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	Tuesday 18 th June 2019 11:00am
3.10	Date/time Bidders should be available if face to face clarifications are required	Friday 21 st June 2019
3.11	Anticipated notification date of successful and unsuccessful Bids	Monday 24 th June 2019
3.12	Anticipated Award date	Wednesday 26 th June 2019
3.13	Anticipated Contract Start date	Monday 1 st July 2019
3.14	Anticipated Contract End date	Sunday 30 th September 2019
3.15	Bid Validity Period	60 Days

Section 4 – Specification

1. Background

The digital economy as a Government priority

The Department for Business, Energy & Industrial Strategy (BEIS) has an ambitious Industrial Strategy which aims to put the UK at the forefront of the industries of the future, ensuring that the UK takes advantage of major global changes, improving people's lives and the country's productivity.¹ The Artificial Intelligence and Data Grand Challenge is already taking action to put the UK at the forefront of the AI and data revolution.²

The Consumer & Competition Policy directorate in BEIS is responsible for ensuring that markets work effectively and in the interests of consumers. Digital markets open incredible new opportunities for innovation and growth benefiting consumers and businesses alike, and it is our responsibility to ensure that these markets continue to evolve in a way which remains competitive, innovative and sustainable

BEIS published the Modernising Consumer Markets green paper in April 2018, which set out a range of measures to ensure that markets are working for all consumers. The paper outlined a range of issues which we will be considering and responding to in future publications.

This work led by BEIS fits into a broader, coordinated approach across Government to make the UK a world leader in digital markets. This includes the work of the Department for Digital, Culture, Media & Sport, such as the Digital Charter³ and the new Centre for Data Ethics & Innovation on online targeting and bias in algorithmic decision-making⁴, as well as the recently concluded Expert Panel on the Digital Economy chaired by Jason Furman⁵.

The importance of personalisation in the digital economy

Price personalisation is where the price a consumer pays is influenced by their characteristics and/or behaviour. This can mean consumers with different characteristics and behaviours can pay different prices for the same product or service.

Price personalisation is not a new phenomenon. It occurs in physical markets when prices are quoted or negotiated (such as building works and household repairs) and often works in the interests of consumers. Price personalisation in digital markets is potentially much wider, covering all purchases from groceries to airline tickets to car rentals. Algorithms can deliver tailored prices to consumers based on a variety of characteristics, search behaviour and histories and other factors, automating what was previously a manual, subjective process. This can mean, in the extreme situation, no two consumers pay the same price for the same product or service online.

The main difference between price personalisation occurring in online and offline markets is that in the former it often occurs unknown to consumers and the basis of which it occurs can be opaque, with the consumer having little scope to negotiate a different deal.

¹ <https://www.gov.uk/government/topical-events/the-uks-industrial-strategy>

² <https://www.gov.uk/government/publications/industrial-strategy-the-grand-challenges/missions>

³ <https://www.gov.uk/government/publications/digital-charter>

⁴ <https://www.gov.uk/government/publications/the-centre-for-data-ethics-and-innovation-calls-for-evidence-on-online-targeting-and-bias-in-algorithmic-decision-making>

⁵ <https://www.gov.uk/government/publications/unlocking-digital-competition-report-of-the-digital-competition-expert-panel>

We know that when made aware of this type of price personalisation, consumers feel uneasy about it in some online contexts. Surveyed consumers perceive price personalisation to be unfair: 78% of UK internet users who were surveyed think that online platforms should be regulated to limit personalisation through the use of consumer data.⁶

Respondents to Modernising Consumer Markets green paper consultation provided views on when price personalisation may be more or less harmful to consumers. All respondents, from consumer groups to the Competition & Markets Authority (CMA), were highly supportive of further research into the use of price personalisation online, in particular its prevalence in the UK and on what basis it occurs.

So far, evidence of price personalisation in the UK is limited. Existing studies to evidence price discrimination online have largely focussed on the US markets; UK studies have been limited in their ability to isolate specific characteristics and behaviours which are driving personalisation. The Competition and Markets Authority (CMA)⁷ investigated variation in search results on the basis of operating system, entry route to website and whether a consumer was logged in as a member. No evidence of personalised pricing was found yet there was some limited evidence of personalised search.

Several European studies have also attempted to detect its presence and only found evidence of such practices in a very limited number of instances. The European Commission undertook a large study, in which price differences were only observed in 6% of tests, and the median price difference observed was less than 1.6%.⁸

The UK/European studies so far have not provided strong evidence of personalised pricing, in spite of consumer concerns and perceptions. This suggests that either there is less personalised pricing than people perceive, or that the tests being used are not picking up personalised pricing where it in fact exists.

Given this uncertainty and evidence gaps, BEIS is commissioning a feasibility study to develop a robust, scalable methodology to identify the prevalence of price personalisation in online markets and the basis upon which it occurs in the UK. This methodology will need to provide an assessment of the technical requirements and resource implications for a full, detailed study. We consider this feasibility study essential before we can conduct large-scale research on price personalisation in digital markets.

This research will directly support the BEIS priority of promoting competitive markets and responsible business practices, as well as efforts across Government to foster sustainable growth in digital markets.

2. Aims and Objectives of the Project

There is a significant opportunity for the UK to lead global understanding of the issues around price personalisation in online markets. This feasibility study will potentially contribute to wider work and be key to early policy development on this critical and emerging issue. Several jurisdictions have considered whether personalisation is occurring, but no significant policy development has occurred as a result of the research.

The **objective** of the study is to produce a viable approach (methodology) to gathering evidence of price personalisation in different online markets. This will inform and shape potential future research study into price personalisation. This will also include an

⁶ European Commission, 2016, '[Special Eurobarometer 447](#)'

⁷ [https://one.oecd.org/document/DAF/COMP/WD\(2018\)53/en/pdf](https://one.oecd.org/document/DAF/COMP/WD(2018)53/en/pdf)

⁸ https://ec.europa.eu/info/publications/consumer-market-study-online-market-segmentation-through-personalised-pricing-offers-european-union_en

assessment of the practical concerns when evidencing price personalisation in online markets in the UK.

The research questions for the feasibility study are:

1. What are the different ways prevalence of price personalisation in online markets can be detected and measured (including the basis of which it occurs)?
2. What are the practical difficulties associated with each method of detecting price personalisation?
3. Given these practicalities, which ways or methodologies are most appropriate and robust to detect price personalisation in online markets, given predefined budget and time constraints? What is the preferred methodology on this basis?
4. What practical requirements would the preferred methodology require? e.g. IT hardware, data science capabilities, legal permissions, etc.
5. Can the methodology be scaled across the economy?

The ultimate **aim** is for this research to inform ongoing Government priorities outlined above, most notably the BEIS Competition Review, the BEIS Consumer White paper, the DCMS National Data Strategy and the Centre for Data Ethics and Innovation. The Competition Review is considering whether the UK competition regime is suitably equipped to tackle the new challenges posed by digital markets. Understanding the scope and scale of online price discrimination, and the extent that this can disadvantage certain groups of consumers and/or give certain firms a competitive advantage over rivals, is of paramount importance.

At this stage, BEIS does not commit to any follow-on research to implement the methodology.

The ethical concerns around price personalisation, and consumer profiling and targeting more generally, have been identified as areas of focus for the new Centre for Data Ethics & Innovation⁹ and so are outside the scope of this study.

3. Suggested Methodology

Given the above project objectives and research objectives, we suggest contractors consider a three-stage approach to this feasibility study to develop a robust methodology to detect price personalisation online.

1. Shortlisting of viable methodologies
2. Analysis of pros and cons of each methodology and selection of preferred methodology
3. Detailed description of preferred methodology, including some sample testing

⁹ <https://www.gov.uk/government/consultations/consultation-on-the-centre-for-data-ethics-and-innovation/centre-for-data-ethics-and-innovation-consultation>

Stage 1: Shortlisting of viable methodologies

We would expect the researchers to review the existing literature on price personalisation to inform the development of potential methodologies. BEIS will provide the supplier a list of the key existing studies to consider (such as Hannak et al., 2014¹⁰, and Mikians et al., 2012¹¹), and the consultant will be required to build on this with additional studies.

Using existing studies as a starting point, we expect contractors to clearly define the different ways price personalisation can work in online markets and their likelihood. Some potential bases of price personalisation are listed below (these are not exhaustive and we would expect the research to offer more).

- Price personalisation based on the customer journey
 - Return/repeat visits to website
 - Search and purchase history, including:
 - Products on the same website
 - The same products on other websites
 - Route to website:
 - Accessing the website URL directly
 - Accessing via different search engines (both sponsored and organic links)
 - Accessing via a digital comparison website
 - Accessing via social media
- Price personalisation based on technical characteristics
 - Being logged-in and/or a 'member' of a website (where applicable)
 - Operating system
 - Web browser
 - Using a mobile or desktop device
 - Geography/location
- Price personalisation based on customer characteristics (revealed or inferred)
 - Age
 - Gender
 - Location
 - Ethnicity

These factors should be used to identify different methodologies by which testing the prevalence of price personalisation is carried out.

We would expect this stage to also produce a shortlist (at least three) different methodologies to test for price personalisation. Previous studies have developed methodologies which run experiments in controlled environments and use virtual personas to generate and document quotes from different websites. We are also aware of the potential of using online mystery shopper techniques.

Stage 2: Analysis of pros and cons of each methodology and selection of preferred methodology

¹⁰ https://www.ftc.gov/system/files/documents/public_comments/2015/09/00011-97593.pdf

¹¹ <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.352.3188&rep=rep1&type=pdf>

Having identified a shortlist of methodologies, we would expect the research to undertake a robust evaluation process to identify the preferred methodology.

Some factors that the researcher will need to consider when selecting a methodology could include:

- How each methodology applies in different online market sectors – can it be deployed without modification?
- How each methodology can identify the factors driving price personalisation?
- Can the methodology be applied selectively, i.e. in one market at a time?
- How does the methodology control for external and environmental factors that might influence prices?
- What is the relative cost, skills requirement and effort required for each methodology?
- What is the likelihood of success of each methodology? What challenges would need to be overcome?
- What is the track record of each methodology? Have they been done before?

As a guide, BEIS would be interested in methodologies that could be carried out within six months.

The researcher would recommend a preferred methodology.

Stage 3: Detailed description of preferred methodology, including some sample testing

This stage would see the researcher set out details of how the preferred methodology can be operationalised, including software requirements and any legal implications. This will include a detailed account of IT, data science, statistical skills amongst others to complete the research. We do not require a detailed project plan, but an indication of costings and approximate timings would be helpful, potentially broken down by number of markets, i.e. whether applying the methodology in multiple online markets could generate economies of scale..

We note that previous studies in the US have set out examples of technical requirements and these may be a useful starting point.¹² The authors have made all technical information and trial materials available (including scripts, parsers and raw data) but these, if chosen, will need to be adapted to function on the websites and products of interest for a UK study.

During this stage, we would also expect the researcher to undertake a short 'proof of concept' for the preferred methodology to confirm its viability. We do not expect this will yield meaningful results on price personalisation prevalence and its factors, but rather confirm that the methodology is viable and could be rolled out with minimal revisions.

¹² See <http://personalization.ccs.neu.edu/Projects/PriceDiscrimination/>

The deliverables required are listed in the next section.

Indicative timings

The table below gives indicative timings.

Task	Timing
Shortlisting of viable methodologies	July 2019
Analysis of pros and cons and selection of preferred methodology	August 2019
Detailed description of preferred methodology and testing	September 2019

Expertise required

The three stages clearly require the supplier to draw on expertise in a range of different fields: economics, statistics, data science, public policy, written communications and external presentations. We would advise all bidders to consider drawing on additional specialist support as necessary to ensure they can deliver on all these areas.

Ethical considerations

As part of the assessment of feasibility, the consultant should consider the technical feasibility of the study and whether this may involve any ethical constraints. For example, it might be feasible to implement a test where past purchasing history is simulated (subject to having the resource to do this) but due ethical concerns this may be excluded. Therefore, the researcher must ensure that the research is delivered in a transparent, fair and ethical way. Most importantly, it is important that the test method does not cause a real, material impact on firm or consumer outcomes or expectations.

We ask that bidders set out what research code(s) they comply with and how they would ensure that all trials are run in a way which is fully compliant with these code(s).

4. Deliverables

The key deliverables are:

1. Technical report with a readable executive summary.
2. Presentations of results (internal and external audiences)
3. Scripts, code, spreadsheets, etc. for proof of concept (if used)

The technical report must contain:

- A succinct executive summary which should cover the results, recommendations and any next steps in a format that is accessible for audiences of all levels of expertise and background knowledge. This should be no more than 10 pages in length. It should clearly present the various methodologies, justification of the preferred methodology and results of feasibility testing.
- Full preferred methodology set out and explained in a level of detail that would allow a future researcher to enact the study. Depending on length, the full technical detail may be restricted to a technical appendix.

The write-up should outline the real-world implications of the findings. For example, whether certain characteristics are likely to be easier to detect in particular markets.

All written outputs need to be fully quality assured and of publishable quality.

The methodology must be provided to BEIS in a format which will allow other researchers to utilise it in the future, e.g. scripts and code. Method materials need to be of a very high analytical and technical standard, with clear structure and labelling, such that a subsequent researcher with relevant technical expertise could use straightforwardly.

At the end of the presentation, the researchers will present results to an internal audience of civil servants. There will be a further presentation to external stakeholders.

The subsequent research which builds on from this feasibility study will be a pioneering data science project in the UK. To ensure that the methodology is robust and effectively peer reviewed, the researchers need to explain the detail of their proposed approach to the project working group, which will comprise data scientists in BEIS, DCMS and the CMA.

Terms and Conditions

Bidders are to note that any requested modifications to the Contracting Authority 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 and the Contracting Authority and any specific external stakeholders the Contracting Authority deems 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	SEL3.11	Compliance to Section 54 of the Modern Slavery Act
Commercial	AW4.1	Contract Terms Part 1
Commercial	AW4.2	Contract Terms Part 2
Price	AW5.5	E Invoicing
Price	AW5.6	Implementation of E-Invoicing
Quality	AW6.1	Compliance to the Specification
-	-	Invitation to Quote – received on time within e-sourcing tool

Scoring criteria			
Evaluation Justification Statement			
In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.			
Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20%
Quality	Proj1.1	Approach to conducting the research	35%
Quality	Proj1.2	Staff to deliver (expertise in data science, statistics, drafting and external communications)	25%

Quality	Proj1.3	Understanding of policy relevance and implications of personalisation	5%
Quality	Proj1.4	Project Plan and Timescales	15%

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:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score.

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

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

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100.

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

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

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

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

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

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

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

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

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

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

Section 6 – Evaluation questionnaire

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

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

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

What makes a good bid – some simple do's 😊

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay, is solely attributable to the Contracting Authority
- 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 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 the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority'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, concise and ideally generic 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 ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

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

DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 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.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.18 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.19 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed word counts, the additional words will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via e-sourcing tool. Responses received by any other method than requested will not be considered for the opportunity.

Some additional guidance notes

- 7.25 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.26 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 as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority. / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.34 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
- 7.35 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 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.
- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority 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

the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.41 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.
- 7.42 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, the Contracting Authority 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 the Contracting Authority 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.

- 7.43 The Government introduced its new Government Security Classifications (GSC) classification scheme on the 2nd April 2014 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. The link below to the Gov.uk website provides information on the new GSC:

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

The Contracting Authority 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](#)