



# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of the Department for  
International Trade (DIT)**

**Subject UK SBS PS16232 European Funding Advice**

**Sourcing reference number PS16232**

**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.  
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VAT registration GB618 3673 25  
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**UKSBS**  
  
*Shared Business Services*

## Table of Contents

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

# 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 Innovation and Skills (BIS) 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

### The Department for International Trade

The Department for International Trade (DIT) was created in July 2016 and is responsible for promoting British trade across the world and ensuring the UK takes advantage of the huge opportunities open to the UK.

DIT's responsibilities include those of the former UK Trade & Investment in helping UK-based companies succeed in the global economy. The Department also helps overseas companies bring their high quality investment to the UK's dynamic economy which is acknowledged as Europe's best place from which to succeed in global business.

The Department offers expertise and contacts through its extensive network in the UK and other diplomatic offices around the world. The organisation provides companies with the tools they require to be competitive on the world stage.

The Department has a regionally-based delivery network providing support for exporters and foreign investors. The delivery of export support is through nine regionally-structured contracts within England. DIT funds these contractors on an annual basis to assist a specified minimum number of new exporters (including companies who have not exported in the previous 12 months) to achieve export success. It is a condition of DIT's contracts with these contractors that they increase the export support in their region through maximising use of European Funding opportunities, using their DIT funding as match.

(<https://www.gov.uk/government/organisations/department-for-international-trade> )

## 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	Department for International Trade, 1 Victoria Steet, London, SW1H 0ET
3.2	Buyer name	Ben Osborne
3.3	Buyer contact details	<a href="mailto:Professionalservices@uksbs.co.uk">Professionalservices@uksbs.co.uk</a>
3.4	Estimated value of the Opportunity	Maximum value for this contract is £18,000.00 excluding 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>. 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	15/11/2016 Contracts Finder
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	21/11/2016 11:00am GMT
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	22/11/2016 14:00pm GMT
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	25/11/2016 14:00pm GMT
3.10	Date/time Bidders should be available if face to face clarifications are required	Not required
3.11	Anticipated rejection of unsuccessful Bids date	30/11/2016
3.12	Anticipated Award date	30/11/2016
3.13	Anticipated Contract Start date	01/12/2016
3.14	Anticipated Contract End date	31/03/2019

3.15	Bid Validity Period	60 Days
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## Section 4 – Specification

### **Background to the Requirement**

The Department for International Trade's (DIT) delivery contractors in the English Regions are applicants for export support projects in all nine English Regions. Export support is an integral part of the wider business support landscape, such as Growth Hubs, and it is essential that ERDF funded export support engages with other business support in the local area, both from the public and private sectors. In the current 2014-20 European Structural & Investment Funds (ESIF) programme, funding agreements are in place for five European Regional Development Fund (ERDF) regional projects; a further four projects are at full application stage and some contractors are also involved in additional sub-regional projects. These projects are worth approximately £80 million (including ERDF and partner match funding) over the project period (two to three years), subject to successful delivery of the projects. DIT's delivery contractors have full responsibility for applying for ERDF, project management and delivery, and for complying with ERDF rules, record keeping and reporting requirements, and therefore have their own expertise in ERDF. DIT's interest is in the added value these projects bring to export support across England, the opportunity they provide for Local Enterprise Partnerships (LEPs) to get involved with DIT in export support, and to ensure that the projects complement and do not duplicate or conflict with DIT's export support objectives.

The UK's decision to leave the European Union has also created the possibility of questions arising about existing or proposed ERDF projects that cannot be anticipated but may raise technical questions on which the Department needs expert advice.

DIT therefore, has an interest in how their delivery contractors' ERDF projects contribute to and align with its own export support services, and the constraints and conditions placed on ERDF. This knowledge is necessary for DIT to participate at national level in policy discussions within Government on ERDF and other European Funding streams. It also must, from time to time, respond to questions from the ERDF Managing Authority and other Government departments about export support projects and their alignment with national delivery. DIT also supports its delivery contractors in discussions with local partners (eg, LEPs and local authorities) on ERDF funded activity, so must understand the issues and requirements DIT's delivery contractors face.

The Department's requirement is for ad hoc advice, in response to specific issues arising, and not to deliver a specific project. It is not certain that the Department will have any need for such advice, although based on previous experience it is likely to be required from time to time during the course of this requirement.

### **Requirement**

To supplement its own in-house expertise on EU Funding, DIT's London HQ English Regional Support Team has a requirement for ad hoc independent advice on the technical and operational aspects of delivering European Funded projects on matters such as (but not limited to):

- outputs and added value;
- management information and reporting requirements;
- European Funding publicity and branding rules;
- ERDF procurement requirements;
- eligible match;
- the relevant Partnership Agreements and Operational Programmes;
- additionality;
- State Aids and the de minimis regulation.

Although this requirement is primarily about ERDF in support of export support, that advice may touch also on DIT's interest in foreign direct investment.

The issues on which the Department will request advice may be of a policy or commercially sensitive nature. The contractor must, therefore, have mechanisms in place to protect such information and not divulge it to third parties without the prior agreement of the Department.

This advice will be required in writing or verbally, and may occasionally require participation alongside DIT officials in meetings with other Government officials or with local partners. Although whenever possible a reasonable amount of time (typically five working days) will be given to the contractor to provide advice, exceptionally some advice may be requested at very short notice (possibly a few hours) according to business need.

The contractor will need to be contactable by telephone and e-mail during normal UK business hours (Monday to Friday) and be prepared to attend occasional meetings in central London or elsewhere in England if and as required.

The Department will pay reasonable travel costs within the UK should the successful bidder be required to attend meetings. Costs will be based on standard Government rates and will be subject to prior approval by the Department.

### **Aims and Objectives**

To provide DIT HQ with independent advice, as required, on the technical and operational aspects of delivering European Funded projects for Export Support, to supplement the Department's own in-house expertise. DIT does not manage any European Funded projects itself, but it's contractors do, so needs to have an understanding around delivery of these projects.

That the Department has relevant practical technical knowledge of EU Funding to inform its discussions with Whitehall colleagues and regional delivery contractors.

This requirement is to supplement the Department's own in-house expertise on European Funding on an ad-hoc basis, should issues requiring in-depth technical understanding arise.

### **Scope**

The contract is for ad hoc technical advice to DIT policy leads on ERDF and possibly other European Funding, to help the Department contribute to policy discussions within Whitehall and to support its delivery contractors in discussions with local partners.

As well as providing advice to DIT's HQ, based in London, the contractor may also be asked

to provide advice directly to DIT's regionally based teams of civil servants. This requirement will not involve providing advice to DIT's delivery contractors, who are recipients of ERDF Funding, whose responsibility it is to commission their own technical and operational advice on ERDF.

### **Timetable**

The requirement will be on a call-off basis in order to respond to specific issues as they may arise; there is no specific issue which is already known to need addressing. No indication can be given of the likely volume of work expected but it could be between 5 and 20 days per year during the course of the requirement, and it may be significantly less. However, this does not preclude unforeseen circumstances which might result in our requirement exceeding 20 days. **DITI** does not commit to any minimum volume of work over the course of the agreement, or to the exclusive use of the supplier for provision of these type of services.

DIT has a requirement until 31 March 2019, when our delivery contractors' European Funded projects are expected to reach an end. The possible need for advice beyond March 2019 will be considered nearer that time.

## 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	Acceptance of the attached Contract Terms.
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Conflict of Interest

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	25%
Quality	AW6.3	Understanding of the Regulations Governing ERDF	25%
Quality	AW6.4	Understanding of Business Support	10%
Quality	AW6.5	Government Support for	15%

		Exporting	
Quality	AW6.6	Understanding of the European Social Fund (ESF)	5%
Quality	AW6.7	Project Team and Capability to Deliver	20%

## 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:  $\text{Score/Total Points multiplied by 50}$  ( $80/100 \times 50 = 40$ )

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 60 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](#)