

Bidder Pack

Procurement Specific Requirements

**Natural England - Breeding Bird Survey and Analysis Thames Basin Heaths**

Procurement Reference Number – C20344

08/2023

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# Section 1: The Invitation

Defra group Commercial on behalf of Defra group and its Arm’s Length Bodies invite you to bid in this competition.

The Bidder Pack comes in two parts.

This first part, **The Core Requirements**, provides details of the General Requirements, Government Transparency Agenda and Government Priorities.

The second part, **The Procurement Specific Requirements**, provides details of the Specification Requirements, Terms and Conditions of Contract, Evaluation Methodology, Procurement Timetable and Definitions.

The Definitions that apply to both parts can be found in Section 5, Appendix 1 of the Procurement Specific Requirements.

The tendering process seeks to determine the Most Economically Advantageous Tender (MEAT). The Authority will evaluate the Tenders using the tender evaluation criteria and weightings listed in Section 4, Evaluation Methodology.

## The Opportunity

This opportunity is advertised by Defra group Commercial on behalf of Defra.

This is an R&D project where Natural England requires a breeding bird survey of Annex 1 birds on the Thames Basin Heaths Special Protection Area

A survey of the populations of the three Annex 1 species, Dartford Warbler, Nightjar and Woodlark to include the 13 SSSIs comprising the Thames Basin Heaths SPA. Monitoring work should take place from February to September in order to ascertain territory numbers for the 3 species. Survey work will need to be completed at appropriate times of day for each species and be sufficient to be confident of the number of territories present on site across the season.

**Table 1.** Name and size of the 13 SSSIs sites to be surveyed, divided by county.

|  |  |  |
| --- | --- | --- |
| **Hampshire SSSIs** | **Surrey SSSIs** | **Berkshire SSSIs** |
| Bramshill (673 ha) | Horsell Common (152 ha) | Broadmoor to Bagshot (1,692 ha) |
| Bourley & Long Valley (729 ha) | Ockham to Wisley Commons (224 ha) | Sandhurst to Owlsmoor (86 ha) |
| Castle Bottom to Yateley and Hawley Commons (922 ha) | Chobham Common (655 ha) |  |
| Hazeley Heath (167 ha) | Ash to Brookwood (1,576 ha) |  |
| Eelmoor Marsh (64 ha) | Whitmoor Common (166 ha) |  |
|  | Colony Bog and Bagshot Heaths (1,127 ha) |  |

## Timetable

The timetable below is subject to change from time to time as notified by the Authority. All Tenderers will be informed via the Authority’s [eSourcing System](https://defra.bravosolution.co.uk/web/login.html).

|  |  |  |  |
| --- | --- | --- | --- |
|  | Activity Title | | Date (Time) |
| Finalise Contracts Finder Notice and Bidder Pack (ITT) | | 01 August 2023 | |
| Clarification deadline | | 21 August 2023 at 14:00 Hours (BST) | |
| Bidder Pack / ITT response date | | 31 August 2023 at 14:00 Hours (BST) | |
| Evaluation of Tender | | 04 September – 06 September 2023 at 16:00 Hours | |
| Moderation Meeting | | 07 September 2023 – 09:00 -11:00 Hours (BST) | |
| Contract award notification | | 08 September 2023 | |
| Contract award | | 10 September 2023 | |
| Contract start date | | 09 October 2023 | |
| Service commencement date | | 09 October 2023 – 08 October 2026 | |
| Extension Provision (Optional) | | 3 Months | |

All timescales are set using a 24-hour clock and when referring to “days” it means calendar days unless otherwise specified (for example, working days).

**Variant Tenders**

The Authority shall not accept variant Tenders.

For the avoidance of doubt, if the Authority has reserved a right to waive a requirement in this Bidder Pack and chooses to exercise such discretion, the Tender will not be considered a variant Tender.

**Abnormally Low Tenders** **or Pricing Anomalies**

If the Authority considers your Tender to appear abnormally low, an initial assessment will be undertaken using a comparative analysis of the pricing proposals received from all Tenderers and the Authority’s valuation of the procurement. If that assessment indicates that your Tender is abnormally low the Authority will request a written explanation of your Tender, or of those parts of your Tender which the Authority considers contribute to your Tender being abnormally low. The Authority reserves the right to reject your Tender if the response does not satisfactorily account for the low level of price or costs proposed.

The assessment of abnormally low tenders will be undertaken strictly in accordance with Regulation 69 of the Public Contracts Regulations 2015, which outlines how abnormally low tenders must be assessed and the circumstances in which the contracting authority can reject the tender.

**Pricing Anomalies**

If in the opinion of the Authority your Tender contains any pricing anomalies (for example apparent discrepancies between the financial submission and other parts of your response) the Authority may seek clarification. If the clarification response indicates that the pricing anomaly was the result of a clear and obvious error, in the interest of fairness the resulting change will be taken into consideration. If the clarification response results in a change to the initial tendered Commercial Response and price, it will not be taken into account.

**Fixed Price**

This requires the Contractor to offer a fixed price based on the specification provided by the Authority. The Contractor is able to provide a fixed price service without further inflationary measures.

This is in accordance with 28.6 of the attached Terms.

If there is a General Change in Law, the Supplier must bear the risk of the change and is not entitled to ask for an increase to the Charges.

# Section 2: The Specification of Requirements

## The Authority’s Priorities

The Thames Basin Heaths (TBH) Special Protections Area (SPA) Strategic Access Management and Monitoring (SAMM) project is hosted by Natural England, is fully funded for perpetuity from developer contributions, and is overseen by the TBH Joint Strategic Partnership Board (JSPB), a body comprising 11 local authorities, and Hampshire and Surrey County Councils.

In 2009 the SAMM project started to gather annual data on three Annex 1 bird species that the SPA is designated for: the Nightjar, Woodlark and Dartford Warbler that nest on the 8,300 hectares of the TBH SPA. This built on a dataset that had started in 2004.

This contract will deliver the following:

1. Accurate annual data, based on robust repeatable methodology, relating to the number of territories for each Annex 1 species across the entire SPA to ensure a continuation of the existing data set.
2. Efficient and effective partnership working with the land managers and owners across the SPA.
3. A detailed report showing breeding territory locations and number of the three species cross the SPA.

## Scope

Appendix 3 sets out the Specification of Requirements.

# Section 3: Terms and Conditions of Contract

The Terms and Conditions of Contract for this procurement are Defra standard Mid-Tier Terms and Conditions.

The Authority proposes that the Contract will commence on **9 October 2023** with a total **duration of 36 months until 8 October 2026.**

Any change to project timings must be discussed and agreed with the Authority at the inception phase and discussed throughout the project duration to allow consideration of any changes.

**Suggested Changes to Conditions of Contract**

Tenderers may raise clarification questions relating to the amendment of contract terms during the clarification period only, as specified in the Timetable, if it can be demonstrated that there is a legal or statutory reason why they cannot be accepted. Where a legal or statutory reason cannot be substantiated the Authority has the right to reject the proposed changed.

Such requests must follow the Clarifications sought by the Tenderer process set out in the Core Requirements element of this Bidder Pack.

Tenderers must be aware that all bids are submitted in acceptance of agreed Defra terms and conditions of contract.  Any clarifications regarding terms and conditions must be discussed & agreed during the tender period.  No discussion of terms and conditions of contract shall be held following tender submission. Failure to agree with the terms and conditions of contract post tender shall result in a bid being deemed non-compliant.

**Section 4: Evaluation Methodology**

The overall aim of the evaluation process is to select the Tender that is the most economically advantageous to the Authority, having regard to the Authority’s overall objectives and the criteria set out below.

Evaluation of Tenders comprise of the stages set out in the table below.

The Authority will carry out its evaluations of the Technical and Commercial elements according to the criteria, sub-criteria and weightings set out in the table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Evaluation Stage 1 - Technical** | **Section Reference** | **Evaluation Criteria** | **Question Scoring/Weighting (%)** |
| Selection Stage: Selection Questionnaire (SQ) responses submitted in response to the Contract Notice | **Part 1:** covers the basic information about the supplier, such as the contact details, trade memberships, details of parent companies, group bidding and so on and is provided for information only.  **Part 2**: covers a series of self-declarations by the supplier regarding whether or not any of the questionnaire exclusion grounds apply and will be assessed on that basis.  **Part 3**: covers a series of self-declaration questions regarding whether or not the company meets the selection criteria in respect of their financial standing and technical capacity. | Pass/Fail  Pass/Fail  Pass/Fail |
| **Section Reference** | **Evaluation Criteria** | **Question Scoring/Weighting (%)** |
| Form of Tender | This stage is not scored but if you do not upload a complete, signed and dated Form of Tender in accordance with the instructions in the eSourcing System/accept the Form of Tender statement in the SQ your Tender will be rejected as non-compliant. | Pass/Fail |

|  |  |  |  |
| --- | --- | --- | --- |
| **Evaluation Stage 1 - Technical** | **Section Reference** | **Evaluation Criteria** | **Question Scoring/Weighting (%)** |
| Evaluation Stage: Technical | This stage will be evaluated in accordance with the criteria set out in the Technical Questionnaire. Responses that do not meet the minimum thresholds **maybe be excluded** from the process at the stage where they do not meet the required level – this will be determined during the consensus meeting.  E01 Methodology  E02 Staff and Experience  E03 Quality Assurance  E04 Health and Safety | 40%  30%  20%  10% |
| The Technical evaluation will account for **70% of the total score**. All responses will be scored in accordance with the detailed guidance within the Authority’s e-Sourcing System and the Technical Questionnaire.  Tenderers must achieve a minimum score of 50 for E01 – E04 the ‘Technical Threshold’ in order to progress to the Commercial evaluation. Tenderers who fail to achieve the stated Technical Thresholds may not proceed to the Commercial evaluation. | | | |
| **Evaluation Stage 2 - Commercial** | **Section Reference** | **Evaluation Criteria** | **Question Scoring/Weighting (%)** |
| Evaluation Stage: Commercial - Pricing Schedule | Prices will be evaluated in accordance with criteria set out in the Pricing Schedule in the Authority’s e-Sourcing System. | Scored |
| The Commercial evaluation will account for **30% of the total score**. All responses will be scored in accordance with the detailed guidance within the Authority’s e-Sourcing System and the Specification of Requirements. | | | |
|  | **Section Reference** | **Calculation** | |
| Final score | The final score is calculated by adding the total quality weighted score with the total commercial weighted score.    The most economically advantageous tender will be the Tender with the highest final score. | |

**Selection Questionnaire - Financial standing**

The Authority will review the economic information provided as part of the Selection Questionnaire response to evaluate a Tenderer’s economic and financial standing. The Authority’s evaluation will be based on all the information reviewed and will not be determined by a single indicator. If, based on its assessment of the information provided in a Response, the Authority decides that a Tenderer does not meet the Authority’s required level of economic standing, the Authority may:

* ask for additional information, including information relating to the Tenderer’s parent company, if applicable; and/or
* require a parent company guarantee or a performance bond.

If the Authority decides that a parent company guarantee or performance bond is required, the Authority will reject a Response if the Tenderer is unable to offer a commitment to make such provision. In addition to the information provided in a Response, the Authority may, at its discretion, consult Dun & Bradstreet reports and other credit rating or equivalent reports depending on where a Tenderer is located.

The Authority’s assessment of economic and financial standing will consider financial strength and risk of business failure. Financial strength is based on tangible net worth and is rated on a scale of 5A (strongest) to H (weakest) obtained from Dun & Bradstreet. There are also classifications for negative net worth and net worth undetermined (insufficient information). Financial strength will be assessed relative to the estimated annual contract value.

The Authority will also consider annual turnover. For this procurement, the Authority expects the contractor to have an annual turnover for each of its last two financial years of at least £2 million British Pounds Sterling.

In the case of a joint venture or a consortium bid, the annual turnover is calculated by combining the turnover of the relevant organisations in each of the last two financial years. In addition, the annual turnover of at least one of those organisations is expected to be £2 million GBP.

Risk of Business Failure is rated on a scale of 1 (minimal) to 4 (significant) obtained from Dun & Bradstreet. There is also a classification of insufficient information. The Authority regards a score of 4 as indicating inadequate economic and financial standing for this procurement. The Authority will also calculate and evaluate the Tenderer’s:

* operating performance: growth or reductions in sales, gross profit, operating profit, profit before tax and earnings before interest, tax, depreciation, amortisation, exceptional items and profit/loss on sale of businesses.
* liquidity: net current assets, movements in cash flow from operations, working capital and quick ratios, and average collection and payments periods; and
* financial structure: gearing ratios and interest cover.

**Evaluation of Responses**

Evaluation of Responses will be undertaken by a panel appointed by the Authority. Each panel member will first undertake an independent evaluation of the Responses applying the relevant evaluation criteria for each question. Then, a moderation meeting will be held at which the evaluation panel will reach a consensus on the marking of each question.

During the consensus meeting, the decision may be taken that a Response will not be carried forward to the next evaluation stage if the consensus view is that the Tenderer has failed to meet any minimum or mandatory requirements, and/or provided a non-compliant response.

All tenderers should be aware of the timescales set to deliver this requirement and only submit a response where they are fully confident of being able to deliver within these parameters.

Tenders will be evaluated by the Programme Management team for appropriateness, on the basis of scope, methods, expertise, and value for money.

**Scoring Criteria**

If a score of **twenty or zero** is awarded to a response to one (1) or more of questions E01 – E04 the Authority **may choose to reject the Tender.**

The technical questionnaire will be scored using the following scale:

|  |  |  |
| --- | --- | --- |
| **Descriptor** | **Score** | **Definition** |
| Very good | 100 | Addresses all the Authority’s requirements with all the relevant supporting information set out in the Bidder Pack. There are no weaknesses and therefore the tender response gives the Authority complete confidence that all the requirements will be met to a high standard. |
| Good | 70 | Addresses all the Authority’s requirements with all the relevant supporting information set out in the Bidder Pack. The response contains minor weaknesses and therefore the tender response gives the Authority confidence that all the requirements will be met to a good standard. |
| Moderate | 50 | Addresses most of the requirements with most of the relevant supporting information set out in the Bidder Pack. The response contains moderate weaknesses and therefore the tender response gives the Authority confidence that most of the requirements will be met to a suitable standard. |
| Weak | 20 | Substantially addresses the requirements but not all and provides supporting information that is of limited or no relevance or a methodology containing significant weaknesses and therefore raises concerns for the Authority that the requirements may not all be met. |
| Unacceptable | 0 | No response or provides a response that gives the Authority no confidence that the requirement will be met. |

Each question will be allocated a score of between 0-100 for the documented response, based on the criteria above.  The scores will be weighted against the technical sub-weighting, and a final technical score will be calculated.  The highest technical score will then receive the maximum 70% technical score to be added to the commercial score in the overall tender evaluation.  Other bidder’s technical scores will be calculated pro rata to the highest technical score.

To enable a consistent and fair evaluation of your tender, we require Suppliers to respond to the questions below, making sure you adhere to the page limits detailed in each section. Words submitted beyond these limits will not be evaluated as part of the tender response.  All sections are mandatory and will be scored. The weighting given to each question is set out below as a percentage of the technical score available.

**Please do not include any commercial information in your response to the technical questionnaire.**

Please upload your response to each section (E01 – E04) as an individual document.  This will allow evaluators to easily differentiate between the response to each section and allow consistent and fair evaluation of bids.  Bidders should not cross reference information provided in each section as they will only be scored on the information requested and provided in each section.

**Technical Evaluation**

|  |
| --- |
| **Technical Evaluation Questions**  *(Technical e*nve*lope – 70%, Commercial envelope – 30%)*  **E01 Methodology (weighting 40%)**  (Your response must be a maximum of 5 sides of A4 (including figures and charts such as Gantt Charts), Arial font size 12. Please upload your document with filename “E01\_your\_company\_name”).  This is a mandatory requirement and is scored. Please **do not** include pricing in the technical response, as this should be restricted to the commercial response only.  Your proposal around the methodology for this work will provide the confidence that the data should be collected for Woodlark and Dartford Warblers using the methodology described in *Bird Monitoring Methods* (Gilbert et al. 1998, also available on the Rare Breeding Bird Pannel website at rbbp.org.uk/bird-monitoring-methods/) and for Nightjar the method described by Conway and colleagues (Conway et al. 2007), with enough visits to the 13 SSSIs (Figure 1, Table 1) to be confident of complete coverage. However, we would be open to discuss alternative methodologies.   * Demonstrate how your organisation intends to deliver the survey in a timely manner. * Describe how key project risks/issues and dependencies will be managed including an initial risk register. * Provide a realistic project programme in the form of a Gantt chart, identifying key milestones and critical path activities, ensuring there is sufficient time for review of draft and final outputs by Natural England staff. * Outline how you will ensure your methodology guarantees survey output is in line with *Bird Monitoring Methods* (Gilbert et al. 1998, also available on the Rare Breeding Bird Pannel website at rbbp.org.uk/bird-monitoring-methods/) for Woodlark and Dartford Warbler, and with Conway et al. 2007 for Nightjar. * Outline how you will manage potential loss of a survey day due to illness, bad weather, closure of some sites (i.e., MOD land). * Describe how the contractor will approach and manage Intellectual Property (IP) Rights to ensure that ownership of foreground IP is identified and rests with the Thames Basin Heaths Partnership. * Outline your approach to managing subcontractors or consortium partners (where applicable). * Demonstrate how your organisation will adhere and comply with the TBH SAMM Project key messages.   **E02 Staff and Experience (weighting 30%)**  (Your response must be a maximum of 4 sides of A4. This includes a brief professional biography for each team member, Arial font size 12. Please upload a document with the filename “E02\_your\_company\_name”).  This is a mandatory requirement and is scored. Please **do not** include pricing in the technical response, as this should be restricted to the commercial response only.  Your proposal will provide the confidence that the team have the relevant technical skills and experience. We will be looking for assurance that an appropriate amount of time at the appropriate level has been allocated to deliver the outcomes of this project.  Your proposal will demonstrate that the team structure is appropriately structured, with sufficient supervision and review to ensure quality.  Key skills include but are not limited to:   * Excellent communication skills (written and verbal). * Proven skills to conduct detailed bird survey of all three key species. * Proven ability to adhere to and replicate the methodology at all sites. * Proven skills in project management, and delivering to time, quality and budget. * Data collection as detailed in the specification, and analysis skills as detailed in the specification. * Data storage and data quality assurance. * Ability to liaise with site owners to inform them of the upcoming survey and the surveyor presence on site on the day.   Your proposal will include:   * A description of how the proposed team will bring their skills and experience to deliver best value and efficiency on this project. * Provide examples of up-to three projects of a similar nature conducted in the past 10 years. * Single point of contact project manager with sufficient experience to manage a project of this kind (examples of experience to be provided in the form of a CV) * CVs for key staff.   **E03 Quality Assurance (weighting 20%)**  (Your response must be a maximum of 2 sides of A4, Arial font size 12. Please upload a document with the filename “E03\_your\_company\_name”).  This is a mandatory requirement and is scored. Please **do not** include pricing in the technical response, as this should be restricted to the commercial response only.  Your proposal should describe the approach you will take to ensure the quality of all key products delivered. Provide details of your quality assurance process and how you will ensure your data are collected according to the required methodology.  **E04 Health and Safety (weighting 10%)**  (Your response must be a maximum of 1 side of A4, Arial font size 12. Please upload a document with the filename “E04\_your\_company\_name”).  This is a mandatory requirement and is scored. Please **do not** include pricing in the technical response, as this should be restricted to the commercial response only.   * + - * Provide information staff experience in fieldwork and how that would be applied to this project, including their ability to undertake surveys in isolated rural areas with patchy mobile phone signal. * Provide information on your company’s response to Covid-19 and how you would ensure the safety of staff and the public, including any changes in restrictions that may come into effect (e.g., use of PPE, social distancing). * Ability of staff to adhere to rules set by landowners (e.g., MOD land). * Confirm staff will be available to undertake a short (approx. 1.5 hr) virtual training session before accessing MOD land (Access to training to be provided by Natural England before the first survey on MOD land). * Provide an example of a risk assessment your organisation would create to cover fieldwork for this project. This should include, but not be limited to, the following: lone working, potentially confrontational behaviour from members of the public and dogs, encounter with cattle, zoonotic diseases (e.g., Lyme disease, Leptospirosis, Q fever, ringworm), and dealing with unexpected change in weather or temperature. |

**Calculation Method**

For both elements, providing the bidder has met any mandatory criteria and minimum quality thresholds, the total weighted scores are calculated as follows:

**Technical (WT)**The calculation used is the following:

X 70%

71.60%

100%

Then i.e.

X 100% = X

Bidder’s Total Technical Score i.e., 71.60%

**Commercial (WC)**

Score = Lowest Tender Price x 30% Maximum available marks

Tender Price

For example, if three Tender Responses are received and Tenderer A has quoted £30,000 as their total price, Tenderer B has quoted £50,000 and Tenderer C has quoted £60,000 then the calculation will be as follows:

**Tenderer A Score = £30,000/£30,000 x 30 (Maximum available marks) = 30%**

**Tenderer B Score = £30,000/£50,000 x 30 (Maximum available marks) = 18%**

**Tenderer C Score = £30,000/£60,000 x 30 (Maximum available marks) = 15%**

The Total Score (weighted) is then calculated by adding the Total Weighted Technical Score to the Total Weighted Commercial Score: **WT+ WC**.

**Commercial Pricing Breakdown applicable to this ITT is on Atamis (**[**https://defra-family.force.com/s/Welcome**](https://defra-family.force.com/s/Welcome)**).**

This should be downloaded; completed and attached to the commercial envelope.

# Section 5: Appendices

## Definitions

Unless the context otherwise requires, the following words and expressions used within the Bidder Pack (except for Section 3: Terms and Conditions of Contract) shall have the following meanings to be interpreted in the singular or plural as the context requires.

|  |  |
| --- | --- |
| **TERM** | **MEANING** |
| **“Authority”** | the Department for Environment, Food and Rural Affairs acting as part of the Crown |
| **“Bidder Pack”** | this invitation to tender and all related documents published by the Authority and made available to Tenderers. |
| **“Contract”** | the contract (set out in Appendix B) to be entered into by the Authority and the successful Tenderer. |
| **“EIR”** | the Environmental Information Regulations 2004 (as amended) together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to those Regulations. |
| **“eSourcing system”** | eSourcing system is the eSourcing system used by the Authority for conducting this procurement, which can be found at <https://defra-family.force.com/s/Welcome> |
| **“FOIA”** | the Freedom of Information Act 2000 (as amended) and any subordinate legislation made under that Act together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to that legislation. |
| **“Form of Tender”** | means the form contained in Annex 2 to the Procurement Specific section of the Bidder Pack which must be signed, scanned and uploaded into the Authority’s eSourcing System by the Tenderer to indicate that it understands the Tender and accepts the various terms and conditions and other requirements of participating in the exercise. |
| **“Information”** | means the information contained in the Bidder Pack or sent with it, and any information which has been made available to the Tenderer by the Authority, its employees, agents or advisers in connection with the procurement. |
| **“Involved Person”** | means any person who is either working for, or acting on behalf of, the Authority in connection with this procurement and/or the Contract including, without limitation, any officer, employee, advisor, agent, member, partner or consultant” |
| **“Pricing Schedule”** | the form accessed via e-Sourcing system (<https://defra-family.force.com/s/Welcome>) in which Tenderers are required to submit their pricing information as part of a Tender. |
| **“Regulations”** | the Public Contracts Regulations 2015. |
| **“Relevant Body** | means any other organisation, body or government department that is working with or acting on behalf of the Authority in connection with this procurement and/or the Contract including, without limitation, its officers, employees, advisors, agents, members, partners, or consultants. |
| **“Response”** | means the information submitted in response to the Bidder Pack via the online response forms on eSourcing system including the Tenderer’s formal Tender. |
| **“Specification of Requirements”** | the Authority’s requirements set out in Section 2 of the Bidder Pack Procurement Specific Requirements. |
| **“Tender”** | the formal offer to provide the goods or services descibed in section 1.1 of part 1 of the Bidder Pack and comprising the responses to the questions in eSourcing system and the Pricing Schedule. |
| **“Tenderer”** | anyone responding to the Bidder Pack and, where the context requires, includes a potential tenderer. |
| **“Timetable”** | the procurement timetable set out in Section 1 of the Bidder Pack Procurement Specific Requirements. |
| **“Workstreams”** | these are the three different areas of the interventions covering animal welfare, health, and environmental sustainability outcomes. Each workstream may be present in an intervention (i.e. all three workstreams are included in the mandatory reporting intervention) and other interventions may only include some of the workstreams (i.e. environmental sustainability as part of the mandatory methodology intervention). |
| **“Headline Outcomes”** | there are three main outcomes for the FDTP (see Table 1). The outcomes within each area may differ by workstreams, as such this document will talk about different outcomes within an outcome area. |
| **SSSI’s** | Site of Special Scientific Interest |

## Form of Tender

The Form of Tender document is located on the Authority’s eSourcing system Atamis <https://defra-family.force.com/s/Welcome>

It is to be printed, signed, scanned and uploaded into the Authority’s e-Sourcing System as instructed within the eSourcing system.



## Specification

The Authority is the UK Government Department responsible for the environment, food and farming and rural affairs (DEFRA). The Authority’s priorities are to secure a healthy natural environment; a sustainable, low-carbon economy; a thriving farming sector and a sustainable, healthy and secure food supply. Further information about the Authority can be found at: [Natural England](http://www.naturalengland.org.uk/)

The purpose of this commission is to survey the Annex 1 birds (Dartford Warbler, Woodlark and Nightjar) in order to monitor their populations across the SPA.

**Specification for bird monitoring programme on the Thames Basin Heaths SPA 2019:**

Natural England requires a breeding bird survey of Annex 1 birds on the Thames Basin Heath Special Protection Area.

A survey of the populations of the three Annex 1 species, Dartford Warbler, Nightjar and Woodlark to include the 13 SSSIs comprising the Thames Basin Heaths SPA. Monitoring work should take place from February to September to ascertain territory numbers for the 3 species. Survey work will need to be completed at appropriate times of day for each species and be sufficient to be confident of the number of territories present on site across the season.

**Table 1.** Name and size of the 13 SSSIs sites to be surveyed, divided by county.

|  |  |  |
| --- | --- | --- |
| **Hampshire SSSIs** | **Surrey SSSIs** | **Berkshire SSSIs** |
| Bramshill (673 ha) | Horsell Common (152 ha) | Broadmoor to Bagshot (1,692 ha) |
| Bourley & Long Valley (729 ha) | Ockham to Wisley Commons (224 ha) | Sandhurst to Owlsmoor (86 ha) |
| Castle Bottom to Yateley and Hawley Commons (922 ha) | Chobham Common (655 ha) |  |
| Hazeley Heath (167 ha) | Ash to Brookwood (1,576 ha) |  |
| Eelmoor Marsh (64 ha) | Whitmoor Common (166 ha) |  |
|  | Colony Bog and Bagshot Heaths (1,127 ha) |  |

![A map of a city

Description automatically generated]()

**Fig 1.** Thames Basin Heaths SPA and SSSIs.

GIS point data of the bird territory locations in ARC GIS format compatible with ESRI ArcGIS 10.7.1 should also be provided, with a separate GIS dataset for each of the 13 SSSIs that comprise the SPA. Digital OS Base map data will have to be provided by the supplier. The raw data in the form of each visit fieldwork map (original or copy), stating the beginning and end time of each survey visit, the date and the weather conditions (visibility, wind and precipitation) will also be needed.

The number of final territories per each species in each of the 13 SSSIs should be given in Microsoft Excel (or compatible) format.

A formal report of the findings will also be needed, with clear details of the methodology used essential, including the way territories have been estimated and what data quality-check has taken place. Details of the weather, disturbance, major events, or any factors affecting bird territory numbers during the survey should also be given. Simple statistics should be used to compare the year data to the results in previous years.

Recommendations for the future monitoring programme.

It is anticipated that this contract will be awarded for a period of 3 years. At the end of each year there will be a break point where the Authority will review the evidence gathered by completed tasks and decide on how to proceed. The Authority may also end the contract at a break point. When the project recommences following a break point the programme of work, including milestones, will be reviewed by the Authority and the contractor so that dates can be updated where necessary.

The monitoring work will begin in February 2024 and then a further period to collate the results and provide themethodological details, to end no later than 5th October 2024. Prices will remain fixed for the duration of the contract award period.

Survey methodology:

Data should be collected for Woodlark and Dartford Warblers using the methodology described in *Bird Monitoring Methods* (Gilbert et al. 1998, also available on the Rare Breeding Bird Pannel website at rbbp.org.uk/bird-monitoring-methods/) and for Nightjar the method described by Conway and colleagues (Conway et al. 2007), with enough visits to the 13 SSSIs (Figure 1, Table 1) to be confident of complete coverage. However, we would be open to discuss alternative methodologies.

Field work should take place annually from late February to mid-July and should aim to cover suitable habitat at each site on at least six occasions, including two visits on still, mild, sunny mornings early in the season to locate Woodlarks, two visits between April and late June to locate Dartford Warblers and two evening visits extended to one hour after sunset between late May and early July to find Nightjars*\*(NB for the MoD Range Danger Areas with restricted access, one survey visit may be acceptable if done in good conditions)*. Determination of the presence/location of a territory should be based on standard BTO categories of breeding evidence where behaviour indicates **probable** and/or **confirmed** breeding. No playback lure is allowed.

Details of previous surveyed areas will be provided, and those areas must be covered for continuity, but other areas within the SPA should be included if colonisation of any of the three species is suspected or reported. Consistency in the use of the methodology by all surveyors is paramount. Territory estimates from multiple visits need to be double-checked by someone with enough experience if the estimates have been carried out by multiple surveyors to ensure consistency. Tenders should provide details of quality assurance methodology.

Lone working is permitted on all sites, and surveyors need not have a Schedule 1 licence, or be accredited agents as there is no need to get close to nests – observation and recording should be done from main paths and tracks.

Site access and permissions:

Some of the SPA has access restrictions due to it being under forestry, commercial quarrying, or Range danger area. The following restrictions are currently in place:

Ash Ranges: closed when the flags are raised. The dates of the ‘flags down’ or maintenance days for Ash will be communicated when released. These are the dates when the site is accessible for surveying. When the red flags are up it’s not safe to enter the Ranges, but you can walk around the perimeter fence line only.

Pirbright Range danger area and Barossa range danger area are fenced and there is no public access. Limited access may be possible to Barossa by arrangement with the MoD.

Part of Bourley and Long Valley has limited access to the public, but surveyor access would be possible by prior arrangement with the MoD. This area is fenced and locked at certain times when sensitive or dangerous vehicle training is taking place.

Part of Castle Bottom to Yateley, south of the A30 which is owned by the Forestry Commission is under commercial quarrying so access would be limited to this area as it is not open to the public.

Forestry operations at Bramshill/ Warren Heath/ Heath Warren on Forestry Commission land Swinley Forest on Crown Estate land as well as operations on MoD land at Ash and Barossa may limit survey effort on associated heathland or cleared forestry areas and appropriate permissions and arrangements would need to be sought around these.

For all sites, landowner permissions will need to be sought. The SAMM project could assist with this by providing site contacts, initial request for permission and referrals, if necessary but the contractor would be responsible for chasing up and collating the permissions to ensure that all were in place before the surveying works begin.

A risk assessment should be undertaken for the work prior to it commencing, including lone working and COVID protocols and should be circulated to all surveying staff. This should be available to the SAMM project manager on request. Contractors are responsible for health and safety of their staff whilst surveying and hold public liability insurance cover. Suitable maps or GIS platform must be provided by the contractor for surveying purposes to ensure that territory recording is accurate.

On MoD sites a safety briefing would need to be undertaken by all surveyors prior to commencement of survey. This should be arranged with the MoD by the contractor. Contact details can be provided by the SAMM project.

The output:

The output should include:

* a report (in paper and electronic format) with tabulated results of the year and a percentage change compared to the previous year and the five-year average. Site-specific results and overall numbers will be required. Details on the possible ecological reasons behind the results should also be provided (habitat management, weather, wildfires, etc).
* the report must also include clear details of the methodology used, including the way territories have been estimated and what data quality-check has taken place, and details of the weather, disturbance, major events, or any factors affecting bird territory numbers during the survey should also be given.
* raw data in the form of fieldwork maps (original or copies) containing location of each bird seen or heard, plus details of the survey date, times (beginning and end), and weather conditions (precipitation, visibility, wind)
* a total of number of territories of each species estimated per each SSSI surveyed, delivered in Microsoft Excel format,
* GIS point data of the bird territory locations should be provided in ARC GIS format compatible with ESRI ArcGIS 10.7.1, with a separate GIS dataset for each of the 13 SSSIs that comprise the SPA and include the site boundary. Any areas of potential Annex 1 bird habitat where there was incomplete survey coverage must be declared. A combined GIS point data file with all the data for the SPA should also be provided.
* PDF files and printouts of all the mapped territories for each SSSI, which may need to be shown as a site summary and then shown at a larger scale: this may mean that on larger sites this would cover 6-8 pages in order to show sufficient detail. All three species can be shown on the same map printout - they needn’t be detailed separately. The report should also include bird territory figures.

Data availability

The figures for total numbers of breeding territories across the SPA are available from Joint Strategic Partnership Board records as reported by the SAMM project on their website. These will be up to date by the next meeting in March 2024. Natural England are unable to release any more detailed site-specific data. Please state in your quote how detailed your comparison to previous years data will be.

Data ownership

The data will be wholly owned by NE.

Key Meetings

|  |  |
| --- | --- |
| **Month** | **Scope** |
| Mid-January | Pre-season meeting. We would like them to present us with a project plan explaining how they intend to tackle the fieldwork for the season. |
| End of February | Brief update on fieldwork progress (Woodlark fieldwork should have started by then) |
| End of March | Brief update on fieldwork progress (Dartford Warblers should have featured this month) |
| End of April | Brief update on fieldwork progress |
| End of May | Brief update on fieldwork progress (Nightjar surveying should be on their radar) |
| End of June | Brief update on fieldwork progress |
| End of July | Brief update on fieldwork progress (the breeding season should be wrapping up) |
| End of August | Debriefing on how the survey season has gone and checking that the report is being planned |
| End of October | The report is due this month, so a summary of the key findings would be useful. |

**Payment**

Payment is proposed to be in two stages. Stage 1 will cover Data Collection and Stage 2 will cover the Authority’s acceptance of the final report.

## Conditions of Contract

For information. Located on the Authority’s -eSourcing system Atamis (<https://defra-family.force.com/s/Welcome>)



## TUPE Data N/A

## Commercial Pricing Workbook



## Staff Time in Days Per Milestone

