Invitation to Quote

Invitation to Quote (ITQ) on behalf of Natural Environment Research Council (NERC) - National Oceanography Centre (NOC)

Subject UK SBS Redevelopment of the MEDIN discovery metadata service

Sourcing reference number IT17257

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

UKSBS
Shared **Business** Services

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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 customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our customers. This allows our customers the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by its customers, UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Customers.

Our Customers who have access to our services and Contracts are detailed here.

Section 2 – About Our Customer

NERC - the Natural Environment Research Council - is the leading funder of independent research, training and innovation in environmental science in the UK.

They invest public money in world-leading science, designed to help them sustain and benefit from our natural resources, predict and respond to natural hazards and understand environmental change. We work closely with policymakers and industry to make sure our knowledge can support sustainable economic growth and wellbeing in the UK and around the world.

The Marine Environmental Data and Information Network (MEDIN) is a partnership of UK organisations committed to improving the management and accessibility of marine data. Our website is http://www.oceannet.org/. A consortium of sixteen sponsoring organisations funds the network and a single point of access to marine data is a key deliverable for MEDIN. The MEDIN marine metadata discovery portal at http://www.oceannet.org/finding_data/search/full has been providing discovery and access to marine data since 2008.

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	Natural Environment Research Council Polaris House, North Star Avenue, Swindon SN2 1EU
3.2	Buyer name	UK SBS ICT Procurement
3.3	Buyer contact details	ICTProcurement@uksbs.co.uk
3.4	Estimated value of the Opportunity	The maximum value of the opportunity will be £28,000 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 will result in the Bid not being considered.**

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	23/06/2017
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	06/07/2017 14.00
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	10/07/2017 14.00
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	14/07/2017 14.00
3.10	Date/time Bidders should be available if face to face clarifications are required	19/07/2017 14.00
3.11	Anticipated rejection of unsuccessful Bids date	21/07/2017
3.12	Anticipated Award date	21/07/2017

3.13	Anticipated Contract Start date	24/07/2017
3.14	Anticipated Contract End date	30/09/2017
3.15	Bid Validity Period	90 Days

Section 4 – Specification

Aims:

To replace the current MEDIN metadata discovery service with a solution that builds upon or is compatible with an existing GeoNetwork 3 instance.

Objectives:

The work has been split into 3 work packages to address the following objectives:

1. To deliver an operational MEDIN Graphical User Interface (GUI), harvester and catalogue built upon or compatible with an existing GeoNetwork 3 instance at https://csw-medin.ceda.ac.uk/geonetwork/srv/eng/catalog.search#/home plus hosting options for the new instance.
2. To provide a MEDIN customized GUI that supports the searching for and display of dataset and service discovery metadata ensuring that the same level of functionality provided by the current portal is met plus the additional requirements specified by MEDIN users.
3. To carry out acceptance testing and final deployment from the test environment to selected host.

The specific outputs and expectations are described under the Requirement heading.

Background to the Requirement:

The Marine Environmental Data and Information Network (MEDIN) is hosted by the National Oceanography Centre (NOC) in Liverpool, a Natural Environment Research Council (NERC) research institute, and its operations are managed by a core team at NOC.

It is worth describing the current systems in place to understand the work that is to be undertaken and the reason for doing it. The current MEDIN discovery metadata service (hereafter the 'MEDIN service') includes metadata harvesting and ingest from a network of metadata providers, cataloguing of metadata, a bespoke MEDIN Discovery Web Service (DWS) and GUI (hereafter the 'MEDIN portal'). The MEDIN portal, hosted on servers at the British Oceanographic Data Centre (BODC), is now outdated and in need of redevelopment in line with current user needs. The Centre for Environmental Data Analysis (CEDA), since 2008, has provided support for a bespoke MEDIN DWS, and have managed the harvest, and ingest of metadata files. CEDA will no longer be supporting the harvest and ingest of metadata to the current MEDIN portal as of autumn 2017. To facilitate the move away from the bespoke DWS, CEDA have created a GeoNetwork 3 instance for MEDIN. Further information on the services built and supported by CEDA can be found in Appendix 1 (attached as separate document) 'MEDIN operations at the Centre for Environmental Data Analysis'. It is primarily included to inform on current arrangements and describe the role played by GeoNetwork in the existing system.

The MEDIN discovery metadata standard

Each record in the MEDIN portal provides information on a marine dataset as described against a standard set of terms known as the MEDIN discovery metadata standard. The MEDIN discovery metadata standard (hereafter the 'MEDIN standard') describes the attributes of datasets and services using a standard set of terms and these terms allow the user to interrogate the portal user Interface through the various querying boxes and drop down lists. The document detailing the MEDIN standard is attached as Appendix 2 (attached as separate document) under attachment, please base your response on this version. Familiarisation with the MEDIN discovery metadata standard is required to help understand the requirements for the new MEDIN portal. The metadata standard is based on the ISO 19115 standard, and includes all core INSPIRE metadata elements. It also complies and is updated against the UK GEMINI metadata standard. The xml produced conforms to the ISO 19139 standard for xml implementation.

The MEDIN standard uses six controlled vocabularies and the new MEDIN service will need to use these lists as well as additional vocabularies as required. They are as follows:

P23 MEDIN Parameter Discipline Keywords
https://www.bodc.ac.uk/data/codes_and_formats/vocabulary_search/P23/
P03 SeaDataNet Agreed Parameter Groups
https://www.bodc.ac.uk/data/codes_and_formats/vocabulary_search/P03/
P02 SeaDataNet Parameter Discovery Vocabulary
https://www.bodc.ac.uk/data/codes_and_formats/vocabulary_search/P02/
SeaVoX salt and fresh water body gazetteer
https://www.bodc.ac.uk/data/codes_and_formats/vocabulary_search/C19/
C64 United Kingdom Charting Progress 2 sea regions
https://www.bodc.ac.uk/data/codes_and_formats/vocabulary_search/C64/
ICES Statistical Rectangles
http://gis.ices.dk/gis/rest/services/ReferenceLayers/ICES_Statistical_Rectangles/MapServer

MEDIN have created a suite of tools to help providers produce metadata records compliant with the MEDIN metadata standard. Each of these tools incorporates software called the MEDIN Schematron that checks the validity of the record created. The current harvesting system does not use the Schematron for validation but MEDIN propose supplying the contractor with the latest version of the Schematron to use for validating harvested records within the new build.

Scope:

The work is split into 3 work packages described under the Requirement heading. All work described is in scope and bids should detail how each work package will be carried out.

The supplier should demonstrate expertise of applications for georeferenced resources and the building of spatial data infrastructures.

The development must comply with W3C and Web Content Accessibility Guidelines (minimal

level of AA) recommendations, with support for IE, Firefox, Netscape, Opera, Google Chrome and Safari browsers as a minimum.

MEDIN take an open access approach in allowing tools and code created on NERC's behalf to be freely available for use by others. Whilst it is preferred that code for this work should be available to third parties via an online repository, it is appreciated that this is not always realistic and bids will be considered equally whether the source code is made public or not.

Requirement:

Please note that deliverables are not in priority order. All requirements should be considered as mandatory.

Work Package 1.

AIM: To deliver an operational MEDIN GUI, harvester and catalogue built upon or compatible with an existing GeoNetwork 3 instance at https://csw-medin.ceda.ac.uk/geonetwork/srv/eng/catalog.search#/home plus hosting options for the new instance.

The existing MEDIN GeoNetwork3 instance is set up to harvest metadata from MEDIN's network of metadata providers. There are currently ten harvest endpoints; six of which are Web Accessible Folders (WAF), one uses GeoNetwork and three use Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH). Harvesting occurs automatically on a daily basis with the ability to execute manual harvesting as required. The existing instance also uses a virtual-CSW feature to provide a catalogue of a subset of the records based on the presence of the 'NDGO0005' keyword. This keyword identifies records that the original provider intends to make available to the data.gov.uk portal via the MEDIN portal; a service we provide to our partners. The endpoint used by data.gov.uk to harvest MEDIN INSPIRE compliant records is https://csw-medin.ceda.ac.uk/geonetwork/srv/eng/csw-MEDIN?SERVICE=CSW&VERSION=2.0.2&REQUEST=GetCapabilities . Using a virtual-CSW feature, the entire content of the internal metadata catalogue is also available for external customised querying and download via a CSW endpoint.

Work package 1 breaks down into the following requirements:

- Enable validation of records against the MEDIN Schematron (developed by SeaZone) prior to ingest plus validation of records created from previous versions of the MEDIN metadata standard. A process will be required to handle the records that do not pass validation. This process should alert the provider to the rejected record(s) to allow for correction and resubmission of records. The process could use a user management interface with each provider having a dedicated administrative account to monitor and manage that provider's records. Each provider should have a function within the user management interface to filter their own records by sub element 22.1 'Originator ' and sub element 22.2 'Custodian'.

- Allow the system to be flexible and extensible to meet the needs of an ever-changing MEDIN standard and expanding DAC network. When operational, the service will be

managed and maintained by an administrator and developer allocated by MEDIN. Administrator level access will be required for general management of metadata, initiation of manual harvest and ingest, changing or adding of metadata provider endpoints and updating of the Schematron version. A reporting system will be required for the administrator that displays the status of harvest and ingest for each provider. Developer level privileges are required for support and future development, for example, implementation in response to updates to the MEDIN Standard like addition of vocabularies.

- The performance target should be < 1 second (speed of return of queries) which is based on the current speed of service to return over 12,000 metadata records.

- As part of this contract, the successful bidder will be required to consider the hosting options available to MEDIN for hosting the service. This is to include a summary of possible costs of hosting and payment plans (fixed costs versus flexible, upfront cost versus retrospective should be included).

Deliverables for Work Package 1.

MEDIN discovery metadata service with a standard, un-customised GUI which includes:

1.1 Schematron validation with administrative accounts set up per organisation providing metadata records ('the provider') that includes an interface reporting on the status of their records and automatic alert system for record failure.
1.2 Virtual CSW endpoint available for open access to the whole or subset of metadata catalogue (as defined by originator and or keyword).
1.3 Administrator and developer accounts set up with administrative interface for oversight of harvest and ingest status across providers and system for initiating harvesting per provider.
1.4 The target of < 1 second for return of queries is demonstrated
1.5 MEDIN is provided with a brief report detailing the hosting options and costs available.

Work Package 2.

AIM: To provide a MEDIN customized GUI that supports the searching for and display of dataset and service discovery metadata ensuring that the same level of functionality provided by the current portal is met plus the additional requirements specified by MEDIN users.

MEDIN commissioned a user consultation exercise to capture user requirements for the redesign of the MEDIN portal. The full report is available at http://www.oceannet.org/library/key_documents/documents/medin_consultation_recommendations_report.pdf. The aim is to maintain at least the existing search functionality of the

existing GUI at http://www.oceannet.org/finding_data/search/full (E=existing in the tables below) whilst improving the overall user experience by adding new features as required by the user (N=new in the tables below). The following table lists the existing (E) and new (N) features all of which will be required within the new GUI.

	General user requirements for the MEDIN GUI	
1	The design should be clearly identifiable as marine related	E
2	The design should feature the MEDIN logo	E
3	The design of the MEDIN portal search interface should allow for a basic and advanced search.	E
4	Search engine optimization of the GUI	E
5	The user should easily know where they are at any given point within the portal and the website. Current confusion exists between the two – this distinction needs to be clear and the relationship between the portal and website cleaned up. The user should be able to find their way to the homepage of the website ('home') as distinct from wanting to initiate a new search on the search interface (note: the left hand menu bar will not be present in the redeveloped search interface, see 8)	N
6	The GUI should make it very clear who the portal audience is and what users are to expect to counter frustration around known issues such as non-direct access to data, which is MEDIN's main goal to enable in the future.	N
7	The display of metadata content should be simplified by the use of icons	N
8	The portal pages do not require a side menu bar to match the main MEDIN webpages, allowing more screen space for the user interface.	N
9	The portal pages should have a responsive layout that scales to the device.	N
10	Ensure that there is a clear means to contact the MEDIN team (either via an email mailto link to enquiries@oceannet.org or via an appropriate form)	E

	User requirements for the search interface	
11	**Basic search** to include free text search (search all fields except sub element Postal Address and Email Address under Element 22 - Responsible party (New) and map search using user defined bounding box (Existing) Free text search to include encapsulated term search, 'and' 'or' defined searches and '-'defined searches (refer to functionality of current search page and information under 'help') (Existing)	E/N

		Advanced search to include date search for when data collected, date of publication i.e. publication date of the resource, INSPIRE topic category, parameter hierarchical searches (P23, P03, P02), data holder organisation. (Existing) 'Open Government Licence'. The 'Advanced search' function should be obvious to the user (it is not currently) (New)	
	12	**Map Interface**. Provide a dynamic map interface with standard navigation controls and pre-selected base layers that the user can switch on/off. Query results to display in map interface with ability to switch records on/off, reorder and back select metadata. Additional predefined base layers can be added by the administrator. User should have ability to add own OGC compliant web service layers and save these (client side i.e. no login required - user will need to accept). User should have ability to select target web service and display results if resource is available in [service] metadata. The map projection should be WGS 84 / Pseudo-Mercator EPSG: 3857.	E
	13	Ability to filter an ongoing search and, knowing where you are within the search, the ability to back track as necessary	E
	14	Include 'save a search' URL function (performed currently using GET request method). This is currently available but not apparent to users so needs to be made more evident	E
	15	Ability to edit a search, perform sub-searching and filtering (edit search is currently possible but filtering is not)	E/N
	16	Ability to export the spatial results from the map search as GML file or shapefile	N
	17	Enable metrics to be generated for 1) the number of clicks through to a MEDIN DAC from the portal 2) number of records added to the portal by each DAC 3) number of DAC records accessed as a result of searching the MEDIN portal	N
	18	On drawing bounding boxes on the map there should be an alternative to using the CTRL key (i.e. selection of a bounding box tool from a menu)	N
	19	For geographic filtering, enable use of polygons for SeaVox Gazetteer and UK Charting Progress 2 sea areas	N

		User requirements for page displaying the results of a user search	
	20	Results of a metadata search to display:- title, 'Originator' (sub element 22.1), green/red traffic light for link to the data [where green light then link to resource locator URL (sub element 5.1) otherwise display the data	N/E

	'Custodian' (sub element 22.1)], limitations on public access, date of metadata creation, data file formats. Enable sorting function on all result columns. Employ the use of icons to help communicate this information.	
21	Include features to download the results of a user search as RSS, Atom, KML, CSV using the current column headers (refer to current portal) but also adding resource locator. Download needs to be all results of a query and not just those displayed on the first page.	N/E
22	The map display of the results needs to be obvious to the user. Bounding boxes on the map display should be rendered so that the boxes, if numerous, can be differentiated somehow	E

	User requirements for the page displaying a metadata record	
23	Metadata display - title, green/red traffic light for data link, sub element 22.1 'Originator ', sub element 22.2 'Custodian', limitations on public access, date of metadata creation, data file formats. Make it default for the full metadata record to be hidden and display the full metadata record results in accordion (or similar).	E
24	Display geographical position of data on a map which the user can zoom out/in to find the position of land in relation to the data.	N
25	Place the person whom the user should contact to obtain the data (resourceProvider, distributor, custodian) at the top of the list of contacts in the responsible party field	N
26	Enable download of individual MEDIN formatted records as CSV and XML file types. Provide the option to download Dublin Core formatted version of metadata records as XML files. Hide Dublin Core formatted versions under 'other formats' to avoid untidy appearance.	E

	Device usage requirements	
27	Apply responsive web design to enable users to search via mobile and tablet. Where there are limitations to responsive design then this should be very clearly communicated to the user. Minimum recommendation: a. Full site access, from a content point of view with dynamic page resizing for different platforms b. Full search access, excluding mapping-based search c. Full results and individual results page access d. Ability to bookmark, save searches, share searches and individual records via social media, email or user accounts e. Icons to be touchscreen friendly	N

	Map-based search is excluded on advice that this function does not transfer well to mobile and tablet use. We are open to receive advice to the contrary though.	

Deliverables for Work Package 2

2.1 As part of the contract, we require a choice of two possible design layouts for a new GUI from which the MEDIN steering group can choose. These should be basic layouts to convey design and features only without large investment of time.

2.2 Customisation of the test instance with the chosen GUI design and configuration of the instance to include all 27 requirements under work package 2.

2.3 The test instance should be available to the MEDIN steering group to allow for monitoring of progress through the development

2.4 Provision of page templates and colour palette to MEDIN for use across the MEDIN website Oceannet.org.

Work Package 3.

AIM: To carry out user acceptance testing (UAT) and final deployment from the test environment to selected host

The test instance will need to be publically available to enable acceptance testing by MEDIN stakeholders. MEDIN will manage the UAT and the test URL will be disseminated to the MEDIN partners email list. Once all acceptance tests are passed, stakeholder recommendations acted upon and the final test instance signed off by MEDIN, the instance should be deployed operationally. Deployment will involve the transfer of the source code/WAR (Web application ARchive) from the test environment to the host selected by MEDIN. Host deployment criteria and security tests will also need to be met before final sign off.

Deliverables for Work Package 3

3.1 Provision of a test instance available for user acceptance testing

3.2 Operational deployment of the new MEDIN discovery metadata service on the host servers

3.3 Fully documented code available to MEDIN. It is also desirable that the code is made available via online repository to third parties. (Refer to section 'Scope).

Timetable:

Start date 24th July 2017
Inception meeting during week beginning 24th July 2017
Weekly telephone/skype meetings
All work needs to be completed by 30th September due to CEDA removing support for the

existing service by that date

Terms and Conditions

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

Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS, the Customer and any specific external stakeholders UK SBS deem required. After evaluation the scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 (5+5+6 =16÷3 = 5.33)

Pass / fail criteria

Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Price	AW5.5	E Invoicing
Price	AW5.6	Implementation of E-Invoicing
Quality	AW6.1	Compliance to the Specification

Scoring criteria

Evaluation Justification Statement
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	20%
Quality	AW6.2	Project Team and Capability to Deliver	20%
Quality	AW6.3	Project Plan	20%
Quality	AW6.4	Methodology	40%

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 x 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 x 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) ÷ 4 = 50
Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100.
All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.
Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80
Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.
Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.
Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.
Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.
Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: Score/Total Points multiplied by 50 (80/100 x 50 = 40)

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

(Option 1 – Quality)
Once the evaluation process and due diligence is complete, should the result of the process result in a tied place(s) then the supplier(s) who scored the highest total in the following quality (criteria) shall be considered the successful supplier and shall be awarded the opportunity

Quality question (AW6.2)
Quality question (AW6.3)
Quality question (AW6.4)
                (Total) 80%

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

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.

7.23   All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.

7.24   Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool.   Where they are not permissible any attachments submitted will not be considered.

7.25   Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.

7.26   Any Contract offered may not guarantee any volume of work or any exclusivity of supply.

7.27   We do not guarantee to award any Contract as a result of this procurement

7.28   All documents issued or received in relation to this procurement shall be the property of UK SBS.

7.29   We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.

7.30   If you are a Consortium you must provide details of the Consortiums structure.

7.31   Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.

7.32   Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public

7.33   Your bid will be valid for 90 days or your Bid will be rejected.

7.34   Bidders may only amend the Contract terms if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract and UK SBS fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.

7.35   We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.

7.36   If you fail mandatory pass / fail criteria we will reject your Bid.

7.37   Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.

7.38   Bidders should note that if they are successful with their proposal UK SBS reserves the right to ask additional compliancy checks prior to the award of any Contract. In

the event of a Bidder failing to meet one of the compliancy checks UK SBS may decline to proceed with the award of the Contract to the successful Bidder.

7.39 All timescales are set using a 24 hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Emptoris.

7.40 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, UK SBS may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to UK SBS during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

7.41 From 2nd April 2014 the Government is introducing its new Government Security Classifications (GSC) classification scheme to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

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

UK SBS reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

USEFUL INFORMATION LINKS

- Emptoris Training Guide
- Emptoris e-sourcing tool
- Contracts Finder
- Tenders Electronic Daily
- Equalities Act introduction
- Bribery Act introduction
- Freedom of information Act