

# Mini Competition



Department for  
Business, Energy  
& Industrial Strategy

**Mini Competition against an existing Framework Agreement (MC)  
on behalf of Department for Business, Energy & Industrial Strategy**

**Subject: Industrial Cooling: Transport, Industrial and Commercial  
Refrigeration (TICR)**

**Sourcing Reference Number: FM21297**

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

Registered in England and Wales as a limited company. Company Number 6330639.  
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VAT registration GB618 3673 25  
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*Version 2.0*

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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 Contracting Authorities improve efficiency, generate savings, and modernise.

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

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

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

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

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

UK SBS currently manages £700m expenditure for its Contracting Authorities.

Contracting Authorities who have access to our services and Contracts are detailed [here](#).

### **Privacy Statement**

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

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

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

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

## **Privacy Notice**

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

### **YOUR DATA**

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;  
Names and contact details of employees proposed to be involved in delivery of the contract.

Names, contact details, age, qualifications, and experience of employees whose CVs are submitted as part of the bid.

#### *Purpose*

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

#### *Legal basis of processing*

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

#### *Recipients*

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

#### *Retention*

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

### **Your Rights**

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

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

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

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

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

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

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

## **International Transfers**

As your personal data is stored on our IT infrastructure and shared with our data processors Microsoft and Amazon Web Services, it may be transferred and stored securely in the UK and European Economic Area. Where your personal data is stored outside the UK and EEA it will be subject to equivalent legal protection through the use of Model Contract Clauses

## **Complaints**

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

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF  
0303 123 1113  
[casework@ico.org.uk](mailto:casework@ico.org.uk)

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

## **Contact Details**

The data controller for your personal data is:

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

You can contact the Data Protection Officer at:

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

## Section 2 – About the Contracting Authority

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

#### 1. BEIS

Leading economy-wide transformation by backing enterprise and long-term growth, generating cheaper, cleaner, homegrown energy, and unleashing the UK as a science superpower through innovation.

The Department for Business, Energy, and Industrial Strategy (BEIS) is responsible for:

- business
- industrial strategy
- science, research, and innovation
- energy and clean growth
- climate change

From 2021 to 2022, our priorities will be to:

- fight coronavirus by helping businesses to bounce back from the impacts of COVID-19, supporting a safe return to the workplace and accelerating the development and manufacture of a vaccine
- tackle climate change: reduce UK greenhouse gas emissions to net zero by 2050
- unleash innovation and accelerate science and technology throughout the country to increase productivity and UK global influence
- back long-term growth: boost enterprise by making the UK the best place in the world to start and grow a business

Read our [Outcome Delivery Plan](#) to find out how we are performing against our priorities.

BEIS is a ministerial department, supported by 42 agencies and public bodies.

BEIS replaced the Department for Business, Innovation and Skills (BIS) and the Department of Energy and Climate Change (DECC) in July 2016. We employ around 5,000 staff who work in our offices in London, Aberdeen and around the UK.

For further information please visit: <http://www.beis.gov.uk>

#### 2. Science and Innovation for Climate Energy (SICE)

As part of the Government's Net Zero Innovation Portfolio, BEIS are investigating new ways in which the UK can deliver its net zero targets. SICE lead the Net Zero Innovation Portfolio which includes programmes such as the Energy Entrepreneurs Fund, the Industrial Energy Efficiency Accelerator and Red Diesel replacement. The portfolio also includes a programme of underpinning technical research, past commissioned research projects have included the "Energy Follow Up Survey", "Cooling in the UK" and "Cost Optimal Domestic Electrification".

## Section 3 – Working with the Contracting Authority

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1	Contracting Authority (CA) Name and address	<b>Department for Business, Energy and Industrial Strategy (BEIS),</b> 1 Victoria Street, Westminster, London, SW1H 0ET
3.2	Buyer name	Rhedyn Griffiths
3.3	Buyer contact details	<a href="mailto:fmprocurement@uksbs.co.uk">fmprocurement@uksbs.co.uk</a>
3.4	Estimated value of the Opportunity	£680,000.00 (excluding VAT)
3.5	Process for the submission of clarifications and Bids	<p><b>All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25.</b></p> <p><b>Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered, unless formally advised to do so by UKSBS.</b></p>

Section 3 - Timescales		
3.6	Date of Issue of Mini Competition to all Bidders	Tuesday 14 <sup>th</sup> June 2022
3.7	<p>Supplier Day - the purpose of this session is to provide responses to the clarification questions received and allow the opportunity for supplier to ask any further clarifications. All clarification questions and responses will be published on the Jaggaer eSourcing Portal before the latest date specified in 3.9.</p> <p>If bidders wish to attend this session, please send contact details (name &amp; email address) of up to 3 attendees via the Jaggaer eSourcing Portal Message Centre.</p>	Monday 27 <sup>th</sup> June 2022 at 10:30-1230 on Microsoft Teams
3.8	Latest date / time Mini Competition clarification questions shall be received through Jaggaer eSourcing Portal	<p><del>Monday 4<sup>th</sup> July 2022</del></p> <p>11:00</p>

		<b>Tuesday 5th July 2022</b> <b>17:00</b>
3.9	Latest date Mini Competition clarification answers should be sent to all Bidders by the Buyer through Jaggaer eSourcing Portal	<del>Monday 11<sup>th</sup> July 2022</del> <b>Thursday 21<sup>st</sup> July 2022</b>
3.10	Latest date / time Mini Competition Bid shall be submitted through Jaggaer eSourcing Portal ( <b>the Deadline</b> )	<del>Wednesday 20<sup>th</sup> July 2022</del> <b>Wednesday 27<sup>th</sup> July 2022</b> 11:00
3.11	Anticipated selection and de selection of Bids notification date	<del>Wednesday 17<sup>th</sup> August 2022</del> <b>Wednesday 24<sup>th</sup> August 2022</b>
3.12	Anticipated Award Date	<del>Friday 19<sup>th</sup> August 2022</del> <b>Friday 26<sup>th</sup> August 2022</b>
3.13	Anticipated Contract Start Date	Thursday 8 <sup>th</sup> September 2022
3.14	Anticipated Contract End Date	Friday 6 <sup>th</sup> September 2024
3.15	Bid Validity Period	90 Days
3.16	Framework and or Lot the Mini competition will be based on	<p>CCS RM3824 Heat Networks and Electricity Generation Assets (HELGA) DPS. Service 1: Energy Advisory, Design and Technical Services</p> <p>Energy Advisory Services:</p> <ul style="list-style-type: none"> <li>• Energy Data Management Software &amp; Systems</li> <li>• Energy Efficiency in Buildings</li> <li>• Energy Storage &amp; Demand Side Response (DSR)</li> <li>• Environmental Services</li> <li>• Heat Networks, Space Heating and Domestic Heating (including Heat Pumps)</li> <li>• Industrial Energy Efficiency</li> <li>• Technology, Science and Energy Modelling</li> </ul> <p>Energy Design Services</p> <ul style="list-style-type: none"> <li>• Industrial Energy Efficiency</li> <li>• Technology, Science and Energy Modelling</li> </ul> <p>Energy Technical Services:</p> <ul style="list-style-type: none"> <li>• Energy Data Management Software &amp; Systems</li> <li>• Energy Efficiency in Buildings</li> <li>• Energy Storage &amp; Demand Side Response (DSR)</li> <li>• Environmental Services</li> </ul>



		<ul style="list-style-type: none"> <li>• Heat Networks, Space Heating and Domestic Heating (including Heat Pumps)</li> <li>• Industrial Energy Efficiency</li> <li>• Technology, Science and Energy Modelling</li> </ul>
3.17	Anticipated Contracts Finder notice and redacted contract publication if applicable.	Within 30 days of contract award

## Section 4 – Specification

### 1. Introduction

This procurement seeks a multidisciplinary team of experts to deliver a research project to improve our knowledge of emissions and innovations of Transport, Industrial, and Commercial Refrigeration (TICR). The outcomes of this work will be used as evidence for various policy work in BEIS, Defra, and DfT. An important part of this project is also to translate the research outputs to both policymakers and industry end-users, such as operators, installers, manufacturers, and estates managers. There is potential to share results internationally via Mission Innovation (MI), and further dissemination opportunities are encouraged.

Existing data suggest TICR represents about 2% of total UK emissions, but there is large uncertainty in this estimate. As the UK is committed to reaching net zero emissions by 2050, it is necessary for the UK Government to better understand all sources of emissions and tackle hard to abate areas. One such area is industrial decarbonisation, for which the UK Government Strategy was published in March 2021. Refrigeration is a significant, and often overlooked, energy end-use in industry, transport and commercial sectors. Innovation in refrigeration has been limited in the past two decades, and the potential for emissions reduction needs to be better understood.

Categorised as “a traditional blind spot in climate and development policy” by the IEA in 2020, several international reports on cooling were recently produced, inviting further innovation and attention to the sector. However, these reports were mostly focused on domestic cooling and mobile air conditioning, which represent over half of cooling emissions. A recent study published by BEIS, “Cooling in the UK” (2021), and the 2019 Energy Innovations Impact Assessment (EINA) produced useful evidence behind the existing cooling innovations and measures to abate emissions, but these were also mostly focused on the domestic sector. We have reviewed existing data sources and literature and found that there was a lack of evidence behind the size of cooling emissions in TICR sectors, and how existing efficient technologies or innovations could abate these, as well as increase energy efficiency.

To answer these questions, the project is envisaged to include the following five work streams:

**Work stream A:** Data gathering of energy use and greenhouse gas (GHG) emissions;

**Work stream B:** Developing models and roadmaps for decarbonisation of TICR sectors;

**Work stream C:** Benchmarking emissions and energy efficiency;

**Work stream D:** Creating end-user toolkits to develop best practice;

**Work stream E:** Providing a summary for policy makers including levers to drive decarbonisation.

The requirements for each work stream are explained in further detail in section 5 - Requirements. The work streams are expected to be interdependent, and there is flexibility in their order. However, the data gathering work stream A underpins the other work streams.

## 2. Aims & Objectives

Global studies rely on uncertain assumptions of refrigeration use and are not specific to the UK. The proposed work aims to answer the following questions:

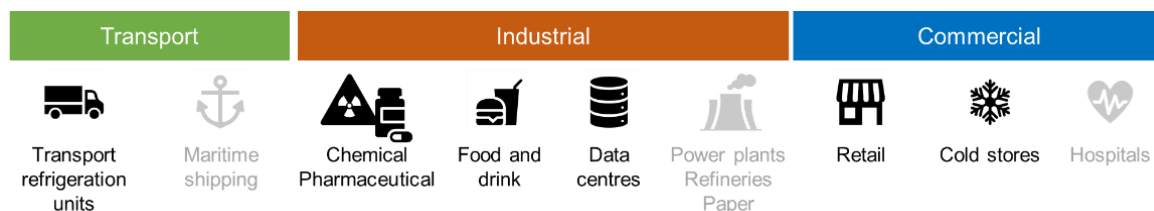
- **What is the current refrigeration energy demand and GHG emissions for each TICR end-use sector?** To gauge the significance of cooling demand and enable prioritisation in decarbonisation. This will inform the statistical data used by BEIS and form benchmarks for industry (reporting their Climate Change Agreements -CCA), and feed into BEIS energy statistics, such as Energy Consumption UK, National Air Emissions Inventory, etc.
- **How will TICR demand/ emissions increase?** No study has yet investigated this for non-domestic cooling needs, despite market drivers increasing demand for dispersed cold storage, warmer temperatures requiring higher cooling loads, and more frequent heat waves.
- **What are the most promising innovations to reduce energy demand in refrigeration, and which areas need government support or will be industry led?** There are many different types of innovations e.g. immersive cooling for data centres, solid state cooling, cabinet doors in supermarkets, more efficient vapour compression systems, integration with renewable energy generation, flexibility, better practice, new refrigerants. This project will quantify and prioritise the innovations in terms of emissions abatement and energy efficiency potential, cost, technology readiness level (TRL), application sector, combination potential. It ought to identify the different barriers and opportunities to overcome them, including regulatory, market (e.g. supply chain costs), and economic (e.g. financial support). The final output is expected to be a roadmap to 2050 presenting various pathways to decarbonise TICR.
- **What tools are needed to deliver net zero in TICR?** There is a need to develop tools and guidance aimed a specific audience (manufacturers and design engineers, installers and service maintenance, end-users and policy makers). For example, guidelines on the trade-off between changing refrigerants and energy efficiency, to enable operators to upgrade their cooling systems to lower emissions systems.
- **What are the opportunities for TICR and implications of this project on policy makers?** Summary report for policy makers: a short summary paper must be produced providing an analysis of innovation opportunities to prioritise, future and forecast emissions, and clear description of the industry.

## 3. Background to the Requirement

Transport, Industrial and Commercial Refrigeration support many critical applications, from keeping vaccines cold to food waste limitation. Cooling contributes to around 30% of non-domestic building energy use and varies by sector. Emissions and energy use are reported as significant but there are inconsistent data. As a mature industry operating often with low gross margins, many businesses have limited visibility of their emissions. TICR systems are often procured on a lowest cost basis, tend to be inefficient, and the incumbent technology is well established. Although there is significant potential through innovation, awareness and technology readiness levels of these innovations are low, and without government support, the sector expects to achieve Net Zero predominantly through electricity decarbonisation, missing opportunities to reduce demand.

This research project is designed to improve the Government's understanding of energy use

and greenhouse gas emissions from TICR applications, and the associated decarbonisation pathways. Through an internal study, BEIS has categorised TICR into six end-use cases with large cooling demands (where cooling represents 15-70% of their energy consumption), as shown in the figure below<sup>1</sup>. These are: transport refrigeration units, chemical & pharmaceutical industry, food & drink manufacturing, data centres, retail, and cold stores. End uses out of scope are shaded in grey: i.e. maritime shipping, hospitals<sup>2</sup>, power plants, refineries, paper and pulp manufacturing<sup>3</sup>.



This project is funded through the Net Zero Innovation Portfolio and will be project managed within the Science and Innovation for Climate and Energy Directorate. A quarterly steering board constituting of policy makers from interested teams within BEIS, DfT and Defra will guide the outcome delivery, to maximise utility of the outputs.

The work is to be delivered by a multidisciplinary team or consortium of technical experts in transport, industrial and commercial refrigeration. It is expected that there will be a project lead, who will call on the relevant experiences of project partners or sub-contractors when applicable. The contractor is to QA all outputs to BEIS internally. Quality will be controlled by BEIS with the contractor throughout with bi-weekly meetings, where project will be tracked against deliverables (e.g. through a Gantt chart), written updates agreed upon at project start, and a set of progress tracking criteria for each work stream updated monthly on a dashboard. Following procurement, the successful tenderer will develop a second level plan of tasks and subtasks for each work package. A wider BEIS policy customer group (known as the Steering Group) will be asked to comment on this to ensure plans are appropriate and all types of innovations, policy levers and innovation approaches are considered. The tenderers will be expected to prepare a quarterly report and summary presentation to present every 3-5 months to the Steering Group to make sure the project aligns with policy needs and available data, and that the outputs are relevant to the policy customers.

#### 4. Scope

This procurement requires the bidder to propose a fully developed plan presenting: an

<sup>1</sup> We estimate these 6 end-use cases represent at least 110% of the currently attributed energy use of TICR in ECUK. This is because no cooling energy use is currently attributed to Transport Refrigeration Units, Pharmaceutical manufacturing or data centres.

<sup>2</sup> Health establishments and emergency services also have significant cooling demand, and we plan to include the high refrigeration of the health cold chain within cold stores and TRUs, but the air conditioning demand is out of scope as the outcomes from the Cooling in the UK research are likely to apply.

<sup>3</sup> Cooling towers for power plants, petroleum and petrochemical refineries, steel and paper mills are out of the scope, because they were not classified as "refrigeration" in ECUK datasets, they have very high efficiencies (COP>14), and are closely linked to processes that need heat rather than cooling. Furthermore, the completely different scales and cooling process (evaporative cooling) limit the potential for technology transfer with the systems considered in our six end-use cases.

understanding of the specification, a methodology to approach the five work streams described below, a fully resourced and timetabled project management plan, a risk assessment and risk management plan, a project team with relevant skills.

All five work streams are to be applied for at once, but the lead bidder may engage with subcontractors or project partners to complement their skills and resource availability.

Each of the five work streams (A-E) is expected to cover all the 6 end-uses cases for TICR, although there may be variation in level of data for each (e.g. larger number of TRUs, few chemical industrial sites).

The project aims to include all UK emissions for Great Britain (Scotland, Wales and England) and Northern Ireland. However, not all data sources cover all the regions, so there is an expectation to clarify geographic scope when suggesting data sources. For example, the Non-Domestic Building Survey only provides data for England and Wales, while Climate Change Agreements are voluntary so not representative of all industrial sites.

The modelling exercises must be done with open-source software (e.g., R or Python) or Microsoft Excel. Models that are developed for use by BEIS must be subject to BEIS QA process. Templates will be provided for Excel models, and QA guidance will be provided at project start. Bidder must allow sufficient time between model development and end of project to implement QA feedback and aim to achieve a score over 85%. The models to be used by BEIS are clearly designated in the requirement.

Where developing a database, this should be done in such a way that it can be stored in the BEIS system, which can be in spreadsheet format or MS SQL. If applicable, contractors may be given access to BEIS IT to enable smoother deployment of database to BEIS system.

## 5. Requirement

The research project is envisaged through five work streams, described below. The methods specified in the requirement can be used as a guidance. Bidders are encouraged to make a detailed submission of methodology and we welcome the case for alternative methodologies to achieve the same outcome. A dashboard is to be developed at project start to track progress.

### **Work stream A: Data gathering of energy use and emissions for TICR**

Work stream A is to include the following aspects:

**Desk study:** Identify for each of the six end-use cases (transport refrigeration units, chemical/pharmaceutical, cold stores, food and drink manufacturing, data centres, retail, cold stores) all data sources for emissions of refrigeration and total number of sites/ vehicles. This will involve use of multiple data sources including, but not restricted to, data from the following: Building Energy Efficiency Survey, Display Energy Certificates, Energy Performance Certificates, Greenhouse Gas Inventory, National Comprehensive Assessment, stock data behind the National Atmospheric Emissions Inventory (NAEI) (from the HFC Outlook model), Red Diesel fuel use, trade association data, Valuation Office Agency, potential Non-Domestic Building Survey, etc. Establish total energy consumption for TICR. The aim is to capture a representative sample of the energy consumption of TICR

for the end-use cases, and estimate the number of sites to determine the total emissions and energy use of TICR.

**Site surveys:** 60 in-depth site surveys. The quantity per sub-sector may vary due to the differences in number of sites, should focus on the sectors that the desk study identified to particularly lack data, and should ideally be no more than 15 for an end-use type. A detailed methodology is required to be developed for each end use investigation to identify the following:

- a. Quantify the proportion of energy use for refrigeration, and cause of refrigeration load (i.e., infiltration, high humidity, high heat generation, etc.).
- b. Physical measurements such as temperature, relative humidity, refrigerant use and temperatures, power use, energy use at different operational settings, U-value of walls, heat loss/ blower tests, IR drones, etc.
- c. Identify good and poor practice. Record change in systems in the past 10 years where possible. Appraise the extent of innovation and good practice.
- d. Identify potential for renewable energy generation including waste heat recovery and use of cooling networks, and energy efficiency improvements.

The successful bidders should work with DfT commissioned research project on decarbonising auxiliary engines on HGVs (including TRUs). This research will include a market survey of the type, number and use of auxiliary engines on HGVs (with a focus on Transport Refrigeration Units), baseline emission testing (GHG and particulate emissions) for some of the most commonly used engine types, and a technology review of low carbon alternatives. At project start, BEIS and DfT contractors will be asked to explore the potential to maximise synergies between the projects by agreeing the timely sharing of data and other findings wherever timelines make this possible.

**Estimate UK total emissions:** Using the desk study and site survey data, relate emissions, attribute cause (leakage, heat loss, energy use, system capacity, temperature setpoint) and extrapolate to estimate total UK emissions. The team should work with the BEIS statistics team to determine an approach such that the proportion of energy consumption for refrigeration that could consistently be used in ECUK statistics breakdowns.

### **Outputs**

A report of not more than 20 pages detailing the estimated total UK emissions for each end-use case. This output is to include a report on the collected data, presenting total emissions by end-use and the type of refrigeration systems used. All data and spreadsheets must be made available to BEIS on project completion. If successful at providing a consistent value, the proportions of energy consumption of refrigeration should become part of ECUK statistical breakdowns. The data collection should also inform the HFC Outlook/NAEI stock breakdown for industrial, commercial and transport refrigeration systems.

Note: the bidders are welcome to make the case and provide a detailed alternative methodology for data collection.

### **Work stream B: Developing models and roadmaps enabling cooling decarbonisation pathways**

Work stream B is to include the following aspects:

Identifying innovations. Three types of innovation have been identified by BEIS (but the

contractor may identify others too):

- (a) Technological solutions: identification of emissions and energy consumption of innovations, such as: automation and AI, system integration, more durable materials, more efficient vapour compression systems, alternatives to vapour compression systems such as phase change materials, barocaloric cooling, and sector specific systems for e.g. data centres or supermarkets.
- (b) Whole building solutions: model the heat loss from site investigations, to determine the abatement potential of retrofitting buildings (mostly cold stores, TRUs, supermarkets and data centres), examples include vacuum insulation, surface coating.
- (c) Operational solutions: model the effect of changing operational conditions on emissions and energy use. This includes the effect of maintenance, more accurate plant sizing, setpoint timings and temperature could abate emissions, energy flexibility, dehumidification demand, refrigerant replacement, dynamic grid integration.

The review of innovative/lower carbon refrigeration systems is expected to include both a desk study component, and an additional data collection component. The data collection is expected to be in the format of telephone interviews, accompanied with a form to collect information on several criteria. **Bidders are expected to present a list of** categorisation criteria, which are likely to include GHG abatement potential, capacity, refrigerant type and use, deployment risk, capital cost, future costs, efficiency, date of availability on the market.

**Bidders should also present their proposed data collection methodology to identify further information than published in literature.** Aim of **60 interviews**, contractor to provide sample (please determine a sample size and reasonable response rate, BEIS assumption is 5% response rate but bidder can use a different assumption if explained). **A suggested** methodology includes computer-assisted telephone interviews with end-users, manufacturers, installers, and academics, with a standardised data collection form, with fields such as 2021 price, year first on the market, capacity, mass of refrigerant, refrigerant type, impact on COP, payback period, etc..

### **Modelling:**

Modelling is used in each end use case to simulate base case performance and then explore the impact of innovation opportunities. Three modelling stages are envisaged, as described below: (1) archetype models of refrigeration end-uses, (2) simulating innovations applied, and (3) developing decarbonisation roadmaps for each sub-sector. The following three stage methodology is suggested as a guide, but the bidders may present an evidence-backed alternative which achieves the same aims.

#### **1- Archetype models for each end-use type (Subject to BEIS QA)**

Using data collected in work stream A from the site surveys, and further assumptions from literature, create 6 physics-based archetype models – one for each end use type – where refrigeration load can be modified by capacity, heat loss and demand size. Bidders are encouraged to suggest other variables to be modifiable in archetype models.

## **2- Model performance of innovations (To be used by BEIS and subject to BEIS QA)**

Using data on innovations earlier in this work stream, develop the archetype models to simulate the **cost and emissions abatement** of different innovations, and their impact on the **performance of the system**. Model the decarbonisation effect of different innovation combinations on the archetype models.

The decarbonisation solutions must also be mapped by compatibility, so the model user could combine measures together when possible, to determine the optimal decarbonisation pathways. For example, roof solar panels would not be compatible with roof surface coating to reduce radiation, while automated doors would be. Potential for integration of renewable energy, waste heat recovery cooling networks and must also form part of the innovation mapping.

## **3- Model abatement to 2050**

Model decarbonisation pathways of the end-use sectors to 2050, by applying innovations. Model to include future scenarios i.e. future energy prices/carbon emissions, climate change projections and F-Gas phase down rates. For this section, the HFC Outlook model for the UK, used for the NAEI, will be made available to the bidder. Information about this model can be found in section 4.29 of the UK's National Inventory Report 2021 (<https://unfccc.int/documents/273439>). The use of an existing model will reduce the BEIS QA requirements, but the model will still need to be QA'd.

**Roadmap development:** Identify policy solutions / decarbonisation pathways to be quantified in terms of cost effectiveness, carbon abatement potential, and rate of acceleration.

### **Outputs**

**The data and models must be made available to BEIS. The models must be made available for BEIS QA procedures and be delivered in time to implement QA issues.**

**Report:** Roadmap of using innovation to reduce cooling emissions for specific sectors, identifying key innovations and their potential cost, impact, feasibility. An example was developed by the Carbon Trust in 2010<sup>4</sup>, where the abatement potential is represented by the size of a point on a plot, against payback period and time to application.

Chapters to include will be (but not limited to):

- cost of innovation and emissions reduction for end-user;
- potential operator savings (e.g. through reduced energy consumption), and potential payback times on investment, to make the case for investment in lower carbon alternative;
- cost profiles of innovation, and cost forecasting with external funding (e.g. economic analysis of how funding might reduce cost of technology), and total emissions abatement;

<sup>4</sup> Carbon Trust, 'Refrigeration Road Map' (2010). Available at: <https://www.epa.gov/sites/production/files/documents/refrigerationroadmap.pdf>



- current and forecast emissions with different policy levers;
- evaluation of the different types of innovation.

### **Work stream C. Benchmarking good practice towards 2050**

Work stream C is to include the following aspects:

**Gathering** and normalising of all the energy use data so they are comparable across sites and within each of the 6 end use cases – will involve statistical methods. For this work stream, the bidders are expected to require Stage A data. Climate Change Agreement Data (CCA) data is published publicly, generally as aggregated data. This data is available for analysis. The more detailed use of data can be explored as part of the research with the successful bidder and BEIS to ensure the use of data doesn't lead to confidentiality issues for individual businesses or sectors where there are a very small number of participants

**Identify poor, good, best and aspirational practice benchmarks** for current applications, suggested benchmarks metrics: kWh energy per year per floor area, tonnes CO<sub>2</sub>e of direct and indirect emissions per unit produced/ sold, actual COP of cooling unit by age, seasonal performance factor, cooling load loss (for cold stores and TRUs), temperature setpoints. Identify, good, poor and best practice benchmarks. Different benchmarks can be suggested.

**Report on benchmarks, and innovations required to achieve them, and produce technical memorandum (can be similar in style to those produced by CIBSE).**

### **Work stream D. End User Toolkits**

Work stream D is to include the following aspects:

**Library curation** of existing resources (including translation of resources from foreign language).

**Development of a special platform/website** for refrigeration.

Production of guidance for 6 end use cases for the following types of users:

- Manufacturers and design engineers
- Installers and service maintenance
- End users (supermarkets, data centres etc.)
- Policy makers

This should include:

1. Curating content for a web-page hosted a standalone website, with regular updates on the dissemination events (bid should include maintenance plan for 2 years post project completion),
2. Repository of online resources related to cooling (Industry of Refrigeration, Cold Chain Federation, ACRIB, etc.)
3. Training sessions for the different types of end-users described above, about the types of innovation, how they work, and their path to deployment.
4. Social media content about the outputs of the project.
5. An animated video describing TICS emissions, their forecast change, and different abatement methods.
6. At least two workshops to industry and policy groups informing on the outcomes on

the project, to be delivered with BEIS project managers.

7. Sharing internationally (e.g. via Mission Innovation)

### **Work stream E. Summary of emissions of TICR, and relevant policy levers to drive decarbonisation**

Pulling together results from work streams A-D combined with an internal and external workshop. This will identify policy opportunities and promising technologies for innovation and potentially where government support is needed.

**Report:** Providing summary of findings in work streams A-D, and policy suggestions to BEIS, including, but not limited to:

- summary of findings A-D;
- total current and future emissions;
- analysis on the different decarbonisation pathways, whether innovation can lower energy demand;
- analysis of geographical refrigeration demand (for dehumidification and cooling), and how this may integrate with district cooling networks;
- recommendations for funding calls, areas that government should support;
- prioritisation of innovation opportunities.

### **Timetable**

30 September 2022	Detailed workplan
20 November 2022	Methodology for work stream A
20 February 2023	Methodology for work stream B
20 March 2023	Launch of website platform for project
20 July 2023	Methodology for work stream C
20 April 2023	Methodology for work stream D
31 March 2024	Report for policy makers (workstream E) to be submitted for first round of review
July- August 2024	Final Workshops
6 September 2024	All deliverables completed

### **Data Security**

The successful tenderer(s) must comply with all relevant Data Protection Legislation, as defined in the terms and conditions applying to this Invitation to Tender.

The successful supplier must comply with the General Data Protection Regulation 2018 (GDPR) and any information collected, processed, and transferred on behalf of the Department, and in particular personal information, must be held and transferred securely. Suppliers must provide assurances of compliance with GDPR and set out in their proposals details of the practices and systems they have in place for handling data securely including transmission between the field and head office and then to the Department. Suppliers will have responsibility for ensuring that they and any subcontractor who processes or handles information on behalf of the Department is conducted securely. The sorts of issues which must be addressed satisfactorily and described in suppliers' submissions include:

- procedures for storing both physical and system data.
- data back-up procedures.
- procedures for the destruction of physical and system data.
- how data is protected.
- data encryption software used.
- use of laptops and electronic removable media.
- details of person/s responsible for data security.
- policies for unauthorised staff access or misuse of confidential/personal data.
- policies for staff awareness and training of DPA.
- physical security of premises.
- How research respondents will be made aware of all potential uses of their data.

Appendix B contains "The General Data Protection Regulation Assurance Questionnaire for Contractors" (Declaration 4) to evidence the extent of readiness. The Authority may ask the Contractor to provide evidence to support the position stated in the questionnaire. The Authority may require the successful Contractor to increase their preparedness where the Authority is not satisfied that the Contractor will be in a position to meet its obligations under the terms and conditions. If the Contractor fails to satisfy the Authority that it will be in a position to meet its obligations under the terms and conditions in the event that the Contractor is successful, the Authority reserves the right to exclude the bidder from this procurement.

### **Consortium Bids**

In the case of a consortium tender, only one submission covering all of the partners is required but consortia are advised to make clear the proposed role that each partner will play in performing the contract as per the requirements of the technical specification. We expect the bidder to indicate who in the consortium will be the lead contact for this project, and the organisation and governance associated with the consortia.

Contractors must provide details as to how they will manage any sub-contractors and what percentage of the tendered activity (in terms of monetary value) will be sub-contracted.

If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided in response to Declaration 3. However, please note the Department reserves the right to require a successful consortium to form a single legal entity in accordance with Regulation 19 of the Public Contracts Regulations 2015 (as amended).

The Department recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the Department so that it can make a further assessment by applying the selection criteria to the new information provided.

### **Conflict of Interest**

The Department's standard terms and conditions of contract include reference to conflict of interest and require contractors to declare any potential conflict of interest to the Secretary of State.

For research and analysis, conflict of interest is defined the presence of an interest or involvement of the contractor, subcontractor (or consortium member) which could affect the actual or perceived impartiality of the research or analysis.

Where there may be a potential conflict of interest, it is suggested that the consortia or organisation designs a working arrangement such that the findings cannot be influenced (or perceived to be influenced) by the organisation which is the owner of a potential conflict of interest. For example, consideration should be given to the different roles which organisations play in the research or analysis, and how these can be structured to ensure an impartial approach to the project is maintained.

The process by which this is managed in the procurement process is as follows:

1. **During the bidding process, organisations are to contact UK SBS via the Jaggaer Messaging Function to discuss whether or not their proposed arrangement is likely to yield a conflict of interest.** Any responses given to individual organisations or consortia will be published on Jaggaer (in a form which does not reveal the questioner's identity). Any organisation thinking of submitting a bid, should share their contact details with the staff member responsible for this procurement, to ensure they receive an update when any responses to questions are published.
2. **Contractors are asked to sign and return Declaration 2 (Appendix B) to indicate whether or not any conflict of interest may be, or be perceived to be, an issue.** If this is the case, the contractor or consortium should give a full account of the actions or processes that it will use to ensure that conflict of interest is avoided. In any statement of mitigating actions, contractors are expected to outline how they propose to achieve a robust, impartial, and credible approach to the research.
3. **When tenders are scored, this declaration will be subject to a pass/fail score,** according to whether, on the basis of the information in the proposal and declaration, there remains a conflict of interest which may affect the impartiality of the research.

Failure to declare or avoid conflict of interest at this or a later stage may result in exclusion from the procurement competition, or in the Department exercising its right to terminate any contract awarded.

### **Terms and Conditions**

The Department's Standard Terms and Conditions of Contract will apply to this contract and are available to view in the document repository section on the Jaggaer eSourcing Portal. Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period. The Department's Terms and Conditions will not consider any other modifications.

### **Further Information on Tender Procedure**

#### **Definitions**

Please note that references to the "Department" throughout these documents mean The Secretary of State for Business, Energy and Industrial Strategy acting through his/her representatives in the Department for Business Energy & Industrial Strategy.

The Freedom of Information Act 2000 ("FOIA") and the Environmental Information Regulations 2004 ("EIR") apply to the Department. You should be aware of the Department's obligations and responsibilities under FOIA or EIR to disclose, on written request, recorded information held by the Department. Information provided in connection with this procurement exercise, or with any contract that may be awarded as a result of this exercise, may therefore have to be disclosed by the Department in response to such a request, unless the Department decides that one of the statutory exemptions under the FOIA or the exceptions in the EIR applies. If you wish to designate information supplied as part of this response as confidential, or if you believe that its disclosure would be prejudicial to any person's commercial interests, you must provide clear and specific detail as to the precise information involved and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. Such designation alone may not prevent disclosure if in the Department's reasonable opinion publication is required by applicable legislation or Government policy or where disclosure is required by the Information Commissioner or the First-tier Tribunal (Information Rights).

Additionally, the Government's transparency agenda requires that tender documents (including ITTs such as this) are published on a designated, publicly searchable web site. The same applies to other tender documents issued by the Department (including the original advertisement and the pre-qualification questionnaire (if used)), and any contract entered into by the Department with its preferred supplier once the procurement is complete. By submitting a tender, you agree that your participation in this procurement may be made public. The answers you give in this response will not be published on the transparency web site (but may fall to be disclosed under FOIA or EIR (see above)). Where tender documents issued by the Department or contracts with its suppliers fall to be disclosed the Department will redact them as it thinks necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.

**Non-Collusion**

No tender will be considered for acceptance if the contractor has indulged or attempted to indulge in any corrupt practice or canvassed the tender with an officer of the Department. Appendix C contains a "Statement of non-collusion" (declaration 1); any breach of the undertakings covered under items 1 - 3 inclusive will invalidate your tender. If a contractor has indulged or attempted to indulge in such practices and the tender is accepted, then grounds shall exist for the termination of the contract and the claiming damages from the successful contractors. You must not:

- Tell anyone else what your tender price is or will be before the time limit for delivery of tenders.
- Try to obtain any information about anyone else's tender or proposed tender before the time limit for delivery of tenders.
- Make any arrangements with another organisation about whether or not they should tender, or about their or your tender price.

Offering an inducement of any kind in relation to obtaining this or any other contract with the Department will disqualify your tender from being considered and may constitute a criminal offence.

## Section 5 – Evaluation of Bids

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

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

The evaluation team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

Once the evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.

Pass / Fail Criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.10	Information security requirements
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information Exemptions
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW4.1	Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW6.3	Declarations
Commercial	AW5.3	Firm and Fixed Price
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable bids
-	-	Mini Competition response received on time within the Jaggaer eSourcing Portal
	In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.	

### Scoring Criteria

### Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings / scoring mechanism detailed within this Mini Competition. The Contracting Authority considers these weightings to be in line with the framework.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	15.00%	15.00%
Technical	PROJ1.1a	Understanding of Project & Methodological Approach	85.00%	10.00%
Technical	PROJ1.1b	Detailed Methodology – Work Stream A		10.00%
Technical	PROJ1.1c	Detailed Methodology – Work Stream B		10.00%
Technical	PROJ1.1d	Detailed Methodology – Work Stream C		5.00%
Technical	PROJ1.1e	Detailed Methodology – Work Stream D		5.00%
Technical	PROJ1.2	Resource, Expertise & Team		15.00%
Technical	PROJ1.3	Project Management, QA & Risk Management		20.00%
Technical	PROJ1.4	Social Value		10.00%

### Evaluation of Criteria

#### Non-Commercial Elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

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

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.



40	Poor response only partially satisfying the 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. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

If deemed to be required by the commercial lead during the review, a moderation meeting will then be convened by the commercial lead with the evaluators concerned and all changes if necessary, will be justified and formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.

**Commercial Elements** will be evaluated 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 Commercial criterion.

For example - Bid 1 £100,000 scores 100,  
 Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80  
 Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.  
 Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.  
 Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.  
 Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

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

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

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

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.

## Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> <li>Mini Competition (MC) bid logged upon opening in alignment with UK SBS's procurement procedures.</li> <li>Any MC response received after the closing date will be rejected unless circumstances attributed to UK SBS, the Contracting Authority or the eSourcing Portal beyond the bidder control are responsible for late submission.</li> </ul>
Compliance check	<ul style="list-style-type: none"> <li>Check all Mandatory requirements are acceptable to the Contracting Authority.</li> <li>Unacceptable responses maybe subject to clarification by the Contracting Authority or rejection of the Bid.</li> </ul>
Scoring of the Bid	<ul style="list-style-type: none"> <li>Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.</li> <li>The bid may be subject to moderation as advised in the criteria section, prior to any award decision.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>The Evaluation team may require written clarification to Bids</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.</li> </ul>
Due diligence of the Bid	<ul style="list-style-type: none"> <li>the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> <li>Submission of insurance documents from the Bidder.</li> <li>Request for evidence of documents / accreditations referenced in the / MC / Bid and / or Clarifications from the Bidder.</li> <li>Taking up of Bidder references from the Bidders Customers.</li> <li>Financial Credit check for the Bidder.</li> </ul> </li> </ul>
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> <li>To review the outcomes of the Due Diligence.</li> <li>To agree final scoring for each Bid, relative rankings of the Bids</li> <li>To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the unsuccessful Bidders response in comparison with the successful Bidders response.</li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>To confirm contents of the letters to enable feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.</li> </ul>

## **Section 6 – Evaluation Response Questionnaire**

Bidders should note that the evaluation response questionnaire is located within the **Jaggaer eSourcing Portal**.

Guidance on how to register and use the Jaggaer eSourcing portal is available at

<https://beisgroup.ukp.app.jaggaer.com/>

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

## Section 7 – General Information

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

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date / time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the Section 3 of the Mini Competition shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise the eSourcing portal 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 Jaggaer eSourcing messaging system to raise any clarifications to our Mini Competition. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g., referencing the question/s they apply to.
- 7.9 Do provide clear and concise and ideally generic contact details, telephone numbers, e-mail details.
- 7.10 Do complete all questions in the evaluation response questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English
- 7.12 Do check and recheck your Bid before dispatch.

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

### DO NOT

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

## Some additional guidance notes

- 7.25 All enquiries with respect to access to the eSourcing portal and problems with functionality within the portal must be submitted to Jaggaer eSourcing Helpdesk

**Phone** 08000 698 632

**Email** [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com)

Please note: Jaggaer is a free self-registration portal. Bidders can complete the online registration at the following link:

<https://beisgroup.ukp.app.jaggaer.com/>

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Response Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UK SBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the Jaggaer eSourcing Portal
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this Mini Competition Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.

- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Jaggaer eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Call Off Contract to the successful Bidder.
- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Jaggaer eSourcing Portal
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

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

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

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

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this Mini Competition to reflect any changes introduced by the GSC. In particular where this Mini Competition 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**

- [Contracts Finder](#)
- [Equalities Act introduction](#)

- [Bribery Act introduction](#)
- [Freedom of information Act](#)

## **8.0 Freedom of information**

- 8.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including Mini Competition templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this Mini Competition, Bidders are agreeing that their participation and contents of their Response may be made public.

## **9.0. Timescales**

- 9.1 [Section 3](#) of the Mini Competition sets out the proposed procurement timetable. The Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

## **10.0. The Contracting Authority's Contact Details**

- 10.1 Unless stated otherwise in these Instructions or in writing from UK SBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this procurement must be directed through the eSourcing tool to the designated UK SBS contact.



- 10.2 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the Jaggaer eSourcing portal. Failure to follow this requirement will result in disqualification of the Response.

## Appendix A – Glossary of Terms

TERM	MEANING
<b>“UK SBS”</b>	means UK Shared Business Services Ltd herein after referred to as UK SBS.
<b>“Bid”, “Response”, “Submitted Bid”, or “MC” Response”</b>	means the Bidders formal offer in response to this Mini Competition
<b>“Bidder(s)”</b>	means the organisations being invited to respond to this Mini Competition.
<b>“Central Purchasing Body”</b>	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
<b>“Conditions of Bid”</b>	means the terms and conditions set out in this MC relating to the submission of a Bid
<b>“Contract”</b>	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
<b>“Contracting Authority”</b>	means a defined term in the Public Contracts Regulations 2015, a public body subject to the procurement Regulations.
<b>“Contracting Bodies”</b>	means the Contracting Authority and any other contracting authorities described in the procurement documentation provided.
<b>“Customer”</b>	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
<b>“Contracts Finder”</b>	The government portal for advertising publically funded procurement awards as a result of a MC if above the required thresholds <a href="https://www.gov.uk/contracts-finder">https://www.gov.uk/contracts-finder</a>
<b>“Due Diligence Information”</b>	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this MC.
<b>“EIR”</b>	mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
<b>“FoIA”</b>	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
<b>“Mandatory”</b>	means any pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
<b>“Mini Competition” or MC”</b>	Means a competitive procedure of more than one bidder equally competing to secure an award of the opportunity as well as all related documents published by UK SBS and made available to Bidders and includes the Due Diligence Information.
<b>“Named Procurement person”</b>	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
<b>“Order”</b>	means an order for served by any Contracting Body on the Supplier
<b>“Other Public Bodies” or “OPB”</b>	means all Contracting Bodies except the Contracting Authority
<b>“Supplier”</b>	means the organisation awarded the Contract
<b>“Supplies /Services / Works”</b>	means any supplies/services and supplies or works set out at within <a href="#">Section 4 Specification</a>