

**COMPETITIVE CONTRACT NOTICE**

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| 1. **Title**: branding and marketing strategy and campaign 2. **Reference**: UKECA11082021 3. **Awarding Authority**: BBC Media Action Ibex House, EC3N1DY, London UK. 4. **Contact**: Ellie Haworth, Ellie.haworth@bbc.co.uk and Julie Boutros, Julie.boutros@bbc.co.uk 5. **Contract Type**: Services 6. **Sub Type**: Advertising and marketing services 7. **Description**: - Development of brand platform and design of a brand system   - Development brand promotion strategy and communication campaign   1. **CPV Codes**: - 79340000 - Advertising and marketing services  - 79413000 - Marketing management consultancy services 2. **Main Site or Location of Works, Main Place of Delivery**: Ukraine 3. **Estimated Value of Requirement**: < 120,000 GBP 4. **Currency**: GBP 5. **Deadline for Submission of Tenders**: 20/10/2021 6. **Address to which they must be sent**: either by post or by courier service, in which case the evidence shall be constituted by the postmark or the date of the deposit slip, to: **Ellie Haworth,** BBC Media Action, Ibex House, 42-47 Minories, EC3N 1DY, London, UK 7. **Other Information**: the contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement. 8. **Procedure Type**: OPEN 9. **Period of Work Start \Date**: estimated on 20th November 2021 10. **Period of Work End Date**: estimated on 28th February 2022 11. **Is this a Framework Agreement**? No |

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# SUBMISSION OF TENDERS

These instructions set out the rules for submitting, selecting and implementing a contract financed under this invitation to tender (ITT). Tenderers should response to this invitation to tender by submitting:

1. One narrative description (method statement) of how they will implement the project which includes objectives, activities, resources, outputs, timeline;
2. One Pricing schedule which details costs par activities using Appendix 1;
3. The Supplier information and declaration form using Appendix 2;
4. The Supplier contact details and self-declaration form using Appendix 3;
5. Exclusion ground form using Appendix 4;
6. The Professional references form using Appendix 5 (the supplier can provide additional references and/or samples).

**Failure to submit a tender containing all the required information and documentation within the deadline specified may lead to the rejection of the tender.**

Tenders must be sent to the contracting authority **before 20/10/2021 at 12.00 UK time**. All applications must include the requested documents. Applications must be submitted in English exclusively to the contracting authority:

* By email to: [Ellie.haworth@bbc.co.uk](mailto:Ellie.haworth@bbc.co.uk) and [Julie.boutros@bbc.co.uk](mailto:Julie.boutros@bbc.co.uk)
* Either by post or by courier service, in which case the evidence shall be constituted by the postmark or the date of the deposit slip, to: **Ellie Haworth,** BBC Media Action, 42-47 Minories, Ibex House, EC3N 1DY, London UK.

The contract title (UA:PBC branding and marketing strategy and campaign) and reference (UKECA11082021) must be clearly indicated on the email subject line or marked on the envelope containing the application. Both must always be mentioned in all subsequent correspondence with the contracting authority.

# INTRODUCTION

BBC Media Action **is supporting the development of UA:PBC, the Ukrainian Public Service Broadcaster. Through this project, BBC Media Action (BBC MA) will procure branding and marketing services on behalf of UA:PBC, as described below.**

**Purpose: Within the project described, BBC Media Action is inviting tenderers to provide the following services:**

1. Conduct a market, audience and competitor analysis;
2. Design and develop a brand strategy and a brand system;
3. Design and roll out a promotional campaign.

**Problem statement:** UA:PBC is a multiplatform public service broadcaster which has a substantial number of media assets with the prospects of further development in its portfolio. . The availability of a large number of media assets and an unstructured brand portfolio does not serve the development of the brand and limits the appeal of the brand to the audience.

# OBJECTIVES

The project aims to provide the broadcaster with the support needed to create a clear and compelling brand and marketing strategy for its entire portfolio of brands. Looking at both the Masterbrand and all its sub-brands, the project aims to articulate each brand’s concept, purpose, positioning, differentiators and personality. This should be contained within a brand guide, which should include but not be limited to: brand system, colour, typography, brand voice/language, sound, motion behaviours, logo and marketing applications (billboards, digital, social, sample promo frames). The objective of this exercise is to create a universal (set of) brand(s) that appeals to all Ukrainians, develop a positive perception among Ukrainian audiences towards the Ukrainian public service broadcaster, and contribute to increasing trust in public service broadcasting. In order to then develop and communicate the brand strengths and drive audiences, the project aims to support the broadcaster in developing a promotional campaign.

For this purpose, BBC Media Action will commission a branding and marketing agency to undertake this task.

# SPECIFICATION OF THE REQUIREMENTS

The branding and marketing agency will work jointly with the Branding and Marketing Consultant, the public service broadcaster, and the agency towards the following:

**Phase 1 – Conduct a market, audience and competitor analysis**

1. Analyse market studies already conducted by the broadcaster and conduct further analysis as needed; analyse the broadcaster’s performance;
2. Analysis of competitors and their positioning in the market;
3. Improve understanding of, and define, target audience following a thorough analysis of existing and potential audience research aimed at understanding audiences, perceptions and needs;
4. Conduct a thorough analysis of the existing brand and its strategy, platforms, assets, strengths, weaknesses, potential areas for improvement;
5. Conduct workshops and brainstorm sessions with the broadcaster to define goals of the rebranding and promotion and overall objectives.

Expected outputs:

* Project timeline, key activities, results, objectives defined and approved by BBC MA and the broadcaster;
* Audience research and analysis conducted and shared with all parties;
* Workshops and brainstorming sessions take place;
* Briefing and next steps.

**Phase 2 – Design and develop a brand strategy and a brand system**

1. Create a brand strategy and architecture for entire portfolio: defining each brand’s concept, purpose, positioning, differentiators and personality;
2. Create a design system and a coherent brand image for the different platforms including digital and social media, television and radio, whilst re-designing the broadcaster’s visual identity including colour, typography, brand voice/language, sound, motion behaviours, logo and marketing applications (billboards, digital, social, sample promo frames). This aims to improve audience knowledge and perception of the brand and enable effective cross-promotion. Conduct testing with audiences to ensure suitability of ideas and tools;
3. Create a style guide that includes brand guidelines and graphic packages including static and motion graphics, for different types of content, various platforms (television radio and social media), and different regional branches. This aims to enable teams to design, conceptualise, and develop digital content and social media campaigns consistently and to high standards.

Expected outputs:

* Brand strategy and architecture developed and approved by management;
* Design system created: new visual identity designed, tested with audience, and approved;
* Static and motion graphics designed, tested with audience, and approved;
* Style guide designed and staff are trained on using it.

**Phase 3 – Design and roll out a promotional campaign**

1. Create a communication strategy for one year. This includes: 1) determining which channels are the most effective for communicating with audiences on the mission, role, and platforms of the broadcaster and 2) determining key communication messages, 3) setting Key Performance Indicators (KPIs) for the communication strategy with clear goals and targets, and 4) setting a promotional budget.
2. Roll out a promotional campaign: while the national broadcaster has been undergoing a reform process for several years as it transitions into a public service broadcaster, the public’s perception and understanding of its mission, role, and independence needs to be addressed. A promotional campaign will increase audience knowledge of its brand, its mission, role, and its various platforms, and is hoped to contribute to increasing the trust in the public service broadcaster and its content.

Expected outputs:

* Communication strategy, including budget designed and approved by all parties;
* Promotional content designed and approved by all parties;
* Campaigned rolled out across different channels.

**Tentative key Dates:**

* **Shortlisting of suppliers and request of creative briefs**: 3rd and 4th week of October 2021;
* **Receipt of creative briefs**: 1st week of November 2021;
* **Selection and negotiations**: 2nd and 3rd week of November 2021;
* **Commissioning**: 4th week of November 2021;
* **Creative design and implementation of Phase 1, 2, 3**: December 2021 to February 2022.

# AWARD CRITERIA

The contract will be awarded from the qualifying tenders on the basis of the most economically advantageous tender in terms of the following criteria:

|  |  |  |
| --- | --- | --- |
| **Award Criteria** | **Maximum Score Available** | |
| Methodology and Approach | 35 points | 35% |
| Relevant Experience | 35 points | 35% |
| Cost | 30 points | 30% |
| Total Maximum Score Available | 100 | 100% |

Methodology and Approach means the proposed approach to meeting the requirements, including strategic methodology and the extent of creativity and innovation displayed. This includes the specific team proposed to work on the UA:PBC account, their qualifications and relevant experience, including length of such experience and their level of involvement in the delivery of this service;

Relevant Experience refers to experience in strategic brand development projects and creative outputs in enterprises of a similar scale and complexity, with evidence of achievements that resulted from their involvement. Demonstrated evidence of three (3) contracts of similar size and nature in the past three years for the services required as outlined in Appendix 5 should be supplied for this purpose;

Cost will be assessed on the basis of ultimate cost in GBP exclusive of VAT. Appendix 1 Pricing Schedule.

# DURATION AND SCOPE OF CONTRACT

1. The duration of the contract is for 3 months. The contract will include the possibility to extend, subject to the performance of the selected service provider;
2. The contract may be extended to incorporate additional brand development, design and communications services depending on the requirements of the organisation, the performance of the successful service provider and the availability of funding.

# GENERAL INFORMATION

1. BBC MA may shortlist tenderers for interview on the basis of the written tender before making a final decision on contract award. Specific dates and times may be advised in due course.
2. BBC MA is not obliged to accept the lowest priced tender, any tender, or all of any tender.
3. BBC MA may conclude, following evaluation of tenders, not to proceed or to proceed with a limited number of elements of the proposal. BBC MA also reserves the right to republish this invitation to tender.
4. Information supplied by tenderers will be treated as contractually binding. However, BBC MA reserves the right to seek clarification or verification of any such information.
5. The successful tenderer will only use consultants identified within the tender, unless otherwise agreed in writing with BBC MA.
6. BBC MA may shortlist tenderers for interview on the basis of the written tender before making a final decision on contract award.
7. The successful tenderer will be responsible for the delivery of all services provided for within the contract on the basis of the agreed fee. Tenders should indicate clearly any discounts to which UA:PBC may be entitled.

# INSTRUCTIONS TO TENDERERS

In submitting the proposal, tenderers must respect all instructions, forms and terms and conditions contained in this Invitation to tender. Failure to submit all required information within the specified deadline may lead to rejection of the tender.

***Tenderers must observe the following:***

1. **Pricing:** tenderers shall complete the Pricing Schedule provided in Appendix 1 clearly indicating proposed project stages, deliverable, days required for completion of each stage, priced individually, inclusive of all costs, fees, and, where applicable, additional charges, necessary for completion of the assignment.

1. **Tender Validity:** tenderers shall indicate the tender validity period (period for which the quoted prices are valid).
2. **Method Statement:** the contracting authority expects from the tenderers to provide in their offers a method statement concerning the different objectives stated on this Invitation to tender. In the method statement, tenderers shall **outline the proposed approach and methodology** to the delivery of the project, outlining proposed project stages including:

- Indicative time input required, providing specific details for completion of each stage of this project;

- The envisaged brand strategy development activities to be employed at each stage;

- The extent of innovation and creativity in addressing the requirements.

1. **Experience of the organisation:** tenderers shall provide information on the organisation outlining details including:

- Relevant expertise in delivering comparable projects of similar scale and complexity;

- Details of three specific strategic brand development contracts undertaken, of similar size and nature in the past three years, that include the range of services outlined in Point 4 (Specification Requirements) which should be supplied for this purpose;

1. **Project Team:** tenderers shall provide information on the team proposed to manage this account outlining details including:

- Extent of experience of each of the proposed account team;

- Details of their respective qualifications and relevant experience.

1. **Queries:** Every effort has been made to ensure that this Invitation to Tender contains all the necessary information for completion of tenders. However, in the interest of equity for all tenderers, requests for additional information, clarification on the contents and all other queries of substance (other than those relating to purely factual or procedural matters) must be submitted via email to Elie Haworth, [Ellie.haworth@bbc.co.uk](mailto:Ellie.haworth@bbc.co.uk) and Julie Boutros, [Julie.boutros@bbc.co.uk](mailto:Julie.boutros@bbc.co.uk), within two weeks before the deadline for submission. Responses to all queries received regarding this tender will be made available one week before the deadline for submission to all interested parties.

# APPENDIX 1: PRICING SCHEDULE

- We envisage that the budget for all phases to be at the maximum of 120,000 GBP excluding VAT.

- In order to have a basis on which to assess the cost of the tasks, please complete the Pricing Schedule below (sections 1, 2 and 3).

- All prices must be quoted in GBP exclusive of VAT.

- The cost proposed should be inclusive of all fees, charges or other costs necessary.

- Please note that travel costs, subsistence and other incidental expenses are not reimbursed by UA:PBC.

- Any other third-party costs must be agreed in advance with UA:PBC.

**Pricing Schedule for Assignment to be completed by the tenderer:**

1. **Phase 1**

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| --- | --- | --- |
| *Please indicate the key actions to be taken (inserts rows as necessary)* | No of Days | Insert GBP  (ex. VAT) |
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| **TOTAL** |  |  |

1. **Phase 2**

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| *Please indicate the key actions to be taken (insert rows as necessary)* | No of Days | Insert GBP  (ex. VAT) |
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| **TOTAL** |  |  |

1. **Phase 3**

|  |  |  |
| --- | --- | --- |
| *Please indicate the key actions to be taken (insert rows as necessary)* | No of Days | Insert GBP  (ex. VAT) |
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|  |  |  |
|  |  |  |
| **TOTAL** |  |  |

*The successful tenderer will be responsible for the delivery of all services provided for within the contract on the basis of the agreed fee. Tenders should indicate clearly any discounts to which UA:PBC may be entitled.*

|  |  |  |
| --- | --- | --- |
| I, ……………………………………………………, confirm that the prices quoted are valid for a period of of ……………………………………. | | |
| Name:  ………………………………………….. | Signed:  ………………………………. | Date:  …………………… |

# APPENDIX 2: POTENTIAL SUPPLIER INFORMATION

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

|  |  |  |
| --- | --- | --- |
| **Section 1.1** | **Potential supplier information** | |
| **Question** | **Response** |
| 1.1(a) | Full name of the potential supplier submitting the information |  |
| 1.1(b)-(i) | Registered office address (if applicable) |  |
| 1.1(b)(ii) | Registered website address (if applicable) |  |
| 1.1(c) | Trading status   1. public limited company 2. limited company 3. limited liability partnership 4. other partnership 5. sole trader 6. third sector 7. other (please specify your trading status) |  |
| 1.1(d) | Date of registration in country of origin |  |
| 1.1(e) | Company registration number (if applicable) |  |
| 1.1(f) | Charity registration number (if applicable) |  |
| 1.1(g) | Head office DUNS number (if applicable) |  |
| 1.1(h) | Registered VAT number |  |
| 1.1(i)-(i) | If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established? | Yes ☐  No ☐  N/A ☐ |
| 1.1(i)-(ii) | If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s). |  |
| 1.1(j)-(i) | Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement? | Yes ☐  No ☐ |
| 1.1(j)-(ii) | If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this. |  |
| 1.1(k) | Trading name(s) that will be used if successful in this procurement |  |
| 1.1(l) | Relevant classifications (state whether you fall within one of these, if so which one)   1. Voluntary Community Social Enterprise (VCSE) 2. Sheltered Workshop 3. Public service mutual |  |
| 1.1(m) | Are you a Small, Medium or Micro Enterprise (SME)? | Yes ☐  No ☐ |
| 1.1(n) | Details of Persons of Significant Control (PSC), if applicable:  - Name;  - Date of birth;  - Nationality;  - Country, state or part of the UK where the PSC lives;  - Service address;  - The date he or she became a PSC in relation to the company ();  - Which conditions for being a PSC are met;  - Over 25% up to (and including) 50%,  - More than 50% and less than 75%,  - 75% or more.  *(Please enter N/A if not applicable)* |  |
| 1.1(o) | Details of immediate parent company:  - Full name of the immediate parent company  - Registered office address (if applicable)  - Registration number (if applicable)  - Head office DUNS number (if applicable)  - Head office VAT number (if applicable)  *(Please enter N/A if not applicable)* |  |

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| **Section 1.2** | **Bidding model** | |
| **Question** | **Response** |
| 1.2(a)(i) | Are you bidding as the lead contact for a group of economic operators? | Yes ☐  No ☐  If yes, please provide details listed in questions 1.2(a) (ii), (a) (iii) and to 1.2(b) (i), (b) (ii), 1.3, Section 2 & 3  If no, and you are a supporting bidder please provide the name of your group at 1.2(a) (ii) for reference purposes, and complete 1.3, Section 2 and 3. |
| 1.2(a)(i) | Name of group of economic operators (if applicable) |  |
| 1.2(a)(i) | Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure. |  |
| 1.2(b)(i) | Are you or, if applicable, the group of economic operators proposing to use sub-contractors? | Yes ☐  No ☐ |
| 1.2(b) - (ii) | If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table; we may ask them to complete this form as well.   |  |  |  |  | | --- | --- | --- | --- | | Name |  |  |  | | Registered address |  |  |  | | Trading status |  |  |  | | Company registration number |  |  |  | | Head Office DUNS number (if applicable) |  |  |  | | Registered VAT # |  |  |  | | Type of organisation |  |  |  | | SME (Yes/No) |  |  |  | | The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables |  |  |  | | The approximate % of contractual obligations assigned to each sub-contractor |  |  |  | | |

# APPENDIX 3 : SUPPLIER CONTACT DETAILS AND DECLARATION

- I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

- I declare that, upon request and without delay, I will provide the certificates or documentary evidence referred to in this document.

- I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement.

- I understand that the contracting authority may reject this submission in its entirety if there is a failure to answer all relevant questions fully, or if false/misleading information or content is provided in any section.

- I am aware of the consequences of serious misrepresentation.

|  |  |
| --- | --- |
| **Contact details and declaration** | |
| **Question** | **Response** |
| Contact name |  |
| Name of organisation |  |
| Role in organisation |  |
| Phone number |  |
| E-mail address |  |
| Postal address |  |
| Signature (electronic is acceptable) |  |
| Date |  |

# APPENDIX 4: EXCLUSION GROUNDS

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

|  |  |  |  |
| --- | --- | --- | --- |
| **Section**  **2.1** | | **Grounds for mandatory exclusion** | |
| **Question** | **Response** |
| 2.1(a) | **Regulations 57(1) and (2)** The detailed grounds for mandatory exclusion of an organisation are set out on this [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions.  Please indicate if, within the past five years, you, your organisation or any other person who has powers of representation, decision or control in the organisation have been convicted anywhere in the world of any of the offences within the summary below and listed on the [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf). | | |
|  | Participation in a criminal organisation | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
|  | Corruption | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
|  | Fraud | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
|  | Terrorist offences or offences linked to terrorist activities | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
|  | Money laundering or terrorist financing | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
|  | Child labour and other forms of trafficking in human beings | | Yes ☐  No ☐  If Yes please provide details at 2.1(b) |
| 2.1(b) | If you have answered yes to question 2.1(a), please provide further details.  Specify: date of conviction, which of the grounds listed the conviction was for, and the reasons for conviction.  Identity of who has been convicted.  If the relevant documentation is available electronically, please provide the web address, issuing authority, precise reference of the documents. | |  |
| 2.2 | If you have answered Yes to any of the points above, have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self-Cleaning) | | Yes ☐  No ☐ |
| 2.3(a) | **Regulation 57(3)** Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions? | | Yes ☐  No ☐ |
| 2.3(b) | If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines. | |  |

**Note:** The authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

|  |  |  |  |
| --- | --- | --- | --- |
| **Section 3** | | **Grounds for discretionary exclusion** | |
| **Question** | **Response** |
| 3.1 | **Regulation 57 (8)**  The detailed grounds for discretionary exclusion of an organisation are set out on this [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions.  Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation. | | |
| 3.1(a) | Breach of environmental obligations? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1 (b) | Breach of social obligations? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1 (c) | Breach of labour law obligations? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(d) | Bankruptcy or insolvency or winding-up proceedings, where the organisation’s assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(e) | Guilty of grave professional misconduct? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(f) | Entered into agreements with other economic operators aimed at distorting competition? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(g) | Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(h) | Been involved in the preparation of the procurement procedure? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(i) | Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions? | | Yes ☐  No ☐  If yes please provide details at 3.2 |
| 3.1(j)  3.1(j)-(i)  3.1(j)- (ii)  3.1(j)-(iii)  3.1(j)-(iv) | Please answer the following statements:  The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.  The organisation has withheld such information.  The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.  The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or has negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award. | | Yes ☐  No ☐  If Yes please provide details at 3.2  Yes ☐  No ☐  If Yes please provide details at 3.2  Yes ☐  No ☐  If Yes please provide details at 3.2  Yes ☐  No ☐  If Yes please provide details at 3.2 |
| 3.2 | If you have answered Yes to any of the above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self-Cleaning) | |  |

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| **Section 4** | | **Economic and Financial Standing** | |
| **Question** | **Response** |
| 4.1 | Are you able to provide a copy of your audited accounts for the last two years, if requested?  If no, can you provide **one** of the following: answer with Y/N in the relevant box. | | Yes ☐  No ☐ |
| (a) A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. | | Yes ☐  No ☐ |
| (b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. | | Yes ☐  No ☐ |
| (c) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). | | Yes ☐  No ☐ |
| 4.2 | Where we have specified a minimum level of economic and financial standing and/ or a minimum financial threshold within the evaluation criteria for this procurement, please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out. | | Yes ☐  No ☐ |

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| --- | --- | --- |
| **Section 5** | **If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:** | |
| **Name of organisation** | |  |
| **Relationship to the Supplier completing these questions** | |  |
| **5.1** | Are you able to provide parent company accounts if requested to at a later stage? | Yes ☐  No ☐ |
| **5.2** | If yes, would the parent company be willing to provide a guarantee if necessary? | Yes ☐  No ☐ |

# APPENDIX 5: PROFESSIONAL REFERENCE

|  |  |  |
| --- | --- | --- |
| **Section 6** | | **Technical and Professional Ability** |
| **6.1** | Relevant experience and contract examples  Please provide details of up to three contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past five years.  The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.  Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).  Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the main intended provider(s) or sub-contractor(s) who will deliver the contract.  If you cannot provide examples see question 6.2 | |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Contract 1 | Contract 2 | Contract 3 |
| Name of customer organisation |  |  |  |
| Point of contact in the organisation |  |  |  |
| Position in the organisation |  |  |  |
| E-mail address |  |  |  |
| Description of contract |  |  |  |
| Contract Start date |  |  |  |
| Contract completion date |  |  |  |
| Estimated contract value |  |  |  |

|  |  |
| --- | --- |
| **6.2** | If you cannot provide at least one example for questions 6.1, in no more than 500 words please provide an explanation for this, e.g. your organisation is a new start-up or you have provided services in the past but not under a contract. |
|  |  |