



## Invitation to Tender

Title:	Alternate delegates for ten International Energy Agency Technology Collaboration Programmes
Tender Reference Number:	prj_798
Deadline for Responses:	1 <sup>st</sup> September 2022 2:00pm



Date: 11<sup>th</sup> August 2022

The Department for Business, Energy & Industrial Strategy (referred to throughout these documents as “BEIS” or the “Department”) wishes to commission technical experts to act as alternate delegates for ten (10) International Energy Agency (IEA) Technology Collaboration Partnerships (TCPs).

Enclosed are the following sections:

- Section 1 (page 6) Instructions on tendering procedures
- Section 2 (page 11) Specification of Requirements
- Section 3 (page 23) Further information on tender procedure
- Section 4 (page 26) Declarations to be submitted by the tenderer;
  - Statement of non-collusion
  - Form of tender
  - Conflict of interest
  - Standard Selection Questionnaire
  - The UK General Data Protection Regulation (UK GDPR) Assurance Questionnaire for Contractors
- Annex A: Pricing schedule
- Annex B: Processing, Personal Data and Data Subjects
- Annex C: Exclusion grounds
- Annex D: Terms and conditions
- Annex E: Travel and subsistence rates
- Annex F: Supplier Day slides and Q&A

Please register your interest in submitting a tender for this project via the Authority’s e-Tendering platform, Jaggaer. It can be accessed via your web browser at <https://beisgroup.ukp.app.jaggaer.com/>. This will ensure you receive immediate notification of updates to the ITT process or answers to questions raised.

Please read the instructions on the tendering procedures carefully since failure to comply with them may invalidate your tender. Your tender must be returned by 1<sup>st</sup> September 2022 2:00pm clearly marked as “TENDER – Lot X”.

I look forward to receiving your response.

Yours sincerely,

Name: Melanie Jans-Singh

Email: [builtenvironmentresearch@beis.gov.uk](mailto:builtenvironmentresearch@beis.gov.uk)

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Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## **Privacy Notice**

This notice sets out how we 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**

We 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*

We are processing your personal data for the purposes of the tender exercise described within the remainder of this Invitation to Tender, or in the event of legal challenge to such tender exercise.

If you intend to use the above personal data collected in the procurement exercise to evaluate the procurement exercise and obtain feedback from tenderers, you need to highlight this here and update the section on retention.

#### *Legal basis of processing*

The legal basis for processing your personal data is processing what 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 this tender exercise and management of the winning contracts, by BEIS, a government department.

#### *Recipients*

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

#### *Retention*

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Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



All tenders will be retained for a period of 6 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.

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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.

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

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As your personal data is stored on the BEIS IT infrastructure and shared with our data processors Microsoft and Amazon Web Services, it may be transferred and stored securely in the UK and EEA. 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 Clause

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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



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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

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 BEIS 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).

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Section 1

# Instructions and Information on Tendering Procedures

Invitation to tender for: Alternate delegates for ten International Energy Agency Technology Collaboration Programmes  
Tender reference number: prj\_798  
Deadline for tender responses: 2:00pm 1st September 2022

## Contents

A.	Indicative Timetable .....	7
B.	Procedure for Submitting Tenders .....	7
C.	Conflict of Interest .....	8
D.	Evaluation of Responses .....	9
E.	Terms and conditions applying to this Invitation to Tender .....	9
F.	Further Instructions to Contractors .....	10
G.	Checklist of Documents to be Returned .....	10

## Tables

Table 1 - Tender Timeline .....	7
Table 2: Tasks and time requirement .....	17
Table 3 - Evaluation Criteria for lots 1-8 .....	24
Table 5 – Evaluation criteria for Lots 9 and 10 .....	27
Table 6 - Scoring Guidance.....	30

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## A. Indicative Timetable

The anticipated timetable for this tender exercise is as follows. The Department reserves the right to vary this timetable. Any variations will be published on contracts finder or circulated to all organisations who have registered an interest in notifications.

**Table 1 - Tender Timeline**

<b>Tender Timeline</b>	<b>Date</b>
<b>Supplier Event</b>	<b>20 July 2022</b>
Advert and full invitation to tender issued	11th August 2022
Deadline for questions relating to the tender	11:00am 16th August 2022
Responses to questions published	19th August 2022
Deadline for receipt of tender	2:00pm 1 <sup>st</sup> September 2022
Evaluation of bids	Week commencing 5th September 2022
Bid clarification (if needed)	Week commencing 12th September 2022
All suppliers alerted of outcome	19th September 2022
10 day standstill	20th Sep to 30th Sep 2022
Contract award on signature by both parties	Week commencing 10th October 2022

The contract is to be for a period of up to 30 months, from week commencing 10<sup>th</sup> October 2022 and ending on 31 March 2025, unless terminated or extended by the Department in accordance with the terms of the contract.

## B. Procedure for Submitting Tenders

The maximum page limit for tenders is 9 for Lots 1-8, and 12 for Lots 9 and 10 (excluding declarations, pricing schedule and CVs). To apply for this tender, please register on <https://beisgroup.ukp.app.jaggaer.com/>. For any registration queries, please contact the Jaggaer Helpdesk on 08000 698 632 or email [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com).

Please upload your proposal before the deadline via <https://beisgroup.ukp.app.jaggaer.com/>.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



For questions regarding the procurement process please contact us via the “Messages” tab of the ITT on Jaggaer.

Tenders will be received up to the time and date stated. Please ensure that your tender is delivered not later than the appointed time on the appointed date. The Department does not undertake to consider tenders received after that time. The Department requires tenders to remain valid for a period indicated in the specification of requirements.

The Department shall have the right to disqualify you from the procurement if you fail to fully complete your response, or do not return all of the fully completed documentation and declarations requested in this ITT. The Department shall also have the right to disqualify you if it later becomes aware of any omission or misrepresentation in your response to any question within this invitation to tender. If you require further information concerning the tender process, or the nature of the proposed contract, use the “Messages” tab of the ITT on the Jaggaer portal. All questions should be submitted by 11am 16<sup>th</sup> August 2022; questions submitted after this date may not be answered. Should questions arise during the tendering period, which in our judgement are of material significance, we will publish these questions with our formal reply by the end of 19<sup>th</sup> August 2022 and circulate – unnamed – to all organisations that have expressed an interest in bidding. All contractors should then take that reply into consideration when preparing their own bids, and we will evaluate bids on the assumption that they have done so.

You will not be entitled to claim from the Department any costs or expenses that you may incur in preparing your tender whether or not your tender is successful.

### C. 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 as 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

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





roles which organisations play in the research or analysis, and how these can be structured to ensure maintain 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 may contact BEIS 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 contract finder (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 3' 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.

## D. Evaluation of Responses

The tender process will be conducted to ensure that bids are evaluated fairly and transparently, in accordance with agreed assessment criteria. Further details are provided in the specification.

## E. Terms and conditions applying to this Invitation to Tender

The Cabinet Office Short Form Terms and Conditions of Contract will apply to this contract. These are available to download on <https://beisgroup.ukp.app.jaggaer.com/>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Please read the Procurement Guidance on UK GDPR and Cyber-Security. The contractor will not be a Joint Data Controller at the start of the contract, and is not expected to transfer personal data outside the European Economic Area or countries highlighted in Procurement Guidance on UK GDPR and Cyber-Security. Rules associated with being a Data Processor are described in Section 12. If at any point the Contractor will be a Joint Data Controller, the data protection provisions contained in the Standard Terms and Conditions will be replaced by a Data Sharing Agreement drafted by Government Legal Department.

## F. Further Instructions to Contractors

The Department reserves the right to amend the enclosed tender documents at any time prior to the deadline for receipt of tenders. Any such amendment will be numbered, dated and issued by 19<sup>th</sup> August 2022. Where amendments are significant, the Department may at its discretion extend the deadline for receipt of tenders.

The Department reserves the right to withdraw this contract opportunity without notice and will not be liable for any costs incurred by contractors during any stage of the process. Contractors should also note that, in the event a tender is considered to be fundamentally unacceptable on a key issue, regardless of its other merits, that tender may be rejected. By issuing this invitation the Department is not bound in any way and does not have to accept the lowest or any tender and reserves the right to accept a portion of any tender unless the tenderer expressly stipulates otherwise in their tender.

## G. Checklist of Documents to be Returned

- Proposal (maximum 9 pages per Lot for Lots 1-8, and 12 pages for Lots 9 and 10)
- Annex A: Pricing schedule
- Declaration 1: Statement of non-collusion
- Declaration 2: Form of Tender
- Declaration 3: Conflict of Interest
- Declaration 4: Standard Selection Questionnaire
- Declaration 5: The General Data Protection Regulation Assurance Questionnaire for Contractors
- Annex B: Processing, Personal Data and Data Subjects

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Section 2

### Specification of Requirements

Invitation to tender for: Alternate delegates for ten International Energy Agency  
Technology Collaboration Programmes

Tender reference number: prj\_798

Deadline for tender responses: 2:00pm 1st September 2022

---

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Contents

1.	Introduction and summary of requirements .....	13
2.	Background.....	15
3.	Aims and Objectives .....	16
4.	Tasks.....	16
4.1	General tasks .....	17
4.2	TCP-specific tasks.....	18
4.3	Operating agent for annexes for Lots 9 and 10.....	19
5.	Outputs Required.....	20
6.	Ownership and Publication .....	20
7.	Quality Assurance.....	20
8.	Timetable .....	20
9.	Challenges.....	21
10.	Ethics.....	21
11.	Working Arrangements .....	21
14.	Skills and experience .....	22
15.	Consortium Bids .....	22
16.	Budget and pricing scenario.....	22
16.1	Budget.....	22
16.2	Pricing scenario .....	23
17.	Evaluation of Tenders .....	24

Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## 1. Introduction and summary of requirements

BEIS is looking for experts in their field with a strong network of contacts across their industry to act as an alternate delegate for the following International Energy Agency (IEA) Technology Collaboration Programmes (TCPs):

Lot 1	Heat Pumping Technologies (HPT)
Lot 2	Hydrogen
Lot 3	Solar Heating and Cooling (SHC)
Lot 4	Energy Conservation through Energy Storage (ECES)
Lot 5	District Heating and Cooling (DHC)
Lot 6	User-Centred Energy Systems
Lot 7	Bioenergy
Lot 8	Energy in Buildings and Communities (EBC)
Lot 9	Geothermal (including leading an annex on mine energy)
Lot 10	International Smart Grid Action Network (ISGAN) (including leading an annex on flexibility markets)

### Acronyms and terminology

IEA TCP	International Energy Agency (IEA) Technology Collaboration Programmes (TCPs): multilateral working groups established by the IEA across 8 themes (Buildings, Electricity, Industry, Transport, Renewable Energy, Fossil Energy, Fusion Power, cross-cutting)
IEA TCP Secretariat	Organises the general TCP administration (requesting invoices, organising annual activities), liaises with the IEA and stakeholders
BEIS delegate	Government representative in the IEA TCPs. Drawn from across technical and policy teams. Primarily responsible for administration and knowledge transfer within BEIS, quality assessment of UK outputs to IEA, but can get more involved depending on expertise and resource.
Alternate delegate (AD)	Experts in their field appointed through open competition. In charge of running the UK's TCP activities and producing main outputs.
BEIS TCP Co-ordinator	Oversees all the TCPs at a working level within BEIS and is responsible for the procurement of BEIS and alternate delegates, the collection of short annual reports for BEIS governing procedures and any general admin tasks not specific to individual TCPs.
Annexes	Sub-tasks produced by TCPs, where members create working groups to produce reports, gather international data on technologies/policies/ business models, etc. Known variously as tasks, sub-tasks, working groups, and

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPs				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	annexes in different TCPs, but referred to as 'annexes' for clarity in this specification.
Operating agent	Project manager or technical lead of an annex. In charge of defining the programme of work of the annexes, and ensuring delivery of outputs. Known under different terminology across TCPs, but used here for clarity.
National Team	A team of UK experts from industry, third sector and academia convened by the alternate delegate.
ExCo	Executive committee meeting which typically occurs twice a year (generally at least once in person).

The tasks associated with the role of alternate delegate are general tasks common to all TCPs, including additional tasks such as active participation in annex work, or chairing the TCP. All delegates are expected to be able to complete all tasks, and the general tasks below are considered a minimum requirement. The Programme of Work will vary by TCP, and will be agreed at the beginning of each year (October 2022, October 2023 and October 2024) with the BEIS delegate. The minimum requirement is expected to correspond to 11 days per financial year. The minimum time requirement for the first financial year of the contract (Oct 22-March 23) is 7 days, leading to the total minimum time requirement over the duration of the contract to be 29 days.

The general tasks are:

- Represent the UK in ExCo Meetings
- Act as the primary liaison between UK industry and the TCP
- Prepare national annual reports for the IEA on the state of research, technology deployment, policy support and projects
- Manage and develop the National Team of interested experts, to coordinate tasks and knowledge dissemination
- Participate in and propose TCP tasks or annexes, which are working groups aimed at delivering a specific task or output, advancing the knowledge base of the relevant TCP area.
- Knowledge transfer from the TCP to BEIS through the BEIS delegate
- Prepare a short annual report summarising TCP activities for BEIS's monitoring and reviewing purposes.

In addition, for Lots 9 and 10 (Geothermal and ISGAN TCPs), the alternate delegate is expected to act as the operating agent for newly set up annexes. This corresponds to additional funding for around 14 days of work per year, with a value up to £10k per year, and up to £30k for the duration of the contract. This will involve creating an international working group on the subject topic, and delivering specific outputs. Please find further details under Section 3 (Tasks).

Please state clearly which lot you are applying for in your submission in the bid title. The application must be submitted by an organisation for a specific individual within the organisation. This can be a company, university, NGO or sole trader. An organisation may submit bids for several lots, but no single individual may be put forward for more than one

Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



lot. Each lot will be assessed individually so please provide a separate application for each lot applied for (including declarations). Each lot will only be awarded to one bidder.

## 2. Background

The IEA works to ensure reliable, affordable and clean energy for its 29 member countries and beyond. Founded in 1974, the IEA was initially designed to help countries co-ordinate a collective response to major disruptions in the supply of oil, such as the crisis of 1973/4. While this remains a key aspect of its work, the IEA has evolved and expanded. It is at the heart of global dialogue on energy innovations.

Technology Collaboration Programmes (TCPs) are independent, international groups of experts that enable governments and industries from around the world to lead programmes and projects on a wide range of energy technologies and related issues. TCPs currently cover topics related to:

- efficient end-use (buildings, electricity, industry, transport)
- cleaner fossil fuels (greenhouse-gas mitigation, extraction, supply, transformation)
- renewable energy and hydrogen (technologies and policies for deployment)
- cross-cutting issues (modelling, technology transfer, project financing)
- fusion power (safety, physics, materials, technologies).

The 6,000 experts in the TCPs work to advance the research, development and commercialisation of energy technologies. The scope and strategy of each TCP is in keeping with the IEA Shared Goals of energy security, environmental protection and economic growth, as well as engagement worldwide. Depending on the TCP, activities may include:

- basic and applied research, technology development and pilot plants
- technology assessment, feasibility studies, environmental impact studies, market analysis, policy implications
- information exchange of research results and programmes
- scientist exchanges
- databases, modelling and systems analysis
- experts' networks.

More information on the IEA and the TCPs is available here <https://www.iea.org/tcp/>.

Each TCP typically has two delegates who represent each country at the Executive Committee; a primary delegate and an alternate delegate.

Each TCP is its own entity and therefore have different methods for organising activities. The types of activities are, however, broadly consistent across the TCPs.

The UK is currently participating in 20 TCPs. The Science and Innovation for Climate and Energy (SICE) directorate in BEIS funds 10 of these, under the Net Zero Innovation

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Portfolio<sup>1</sup>. BEIS would like to commission alternate delegates for all ten of these TCPs to represent the UK industry alongside the primary BEIS delegate:

- Heat Pumping Technologies (HPT) - <http://www.heatpumpingtechnologies.org>
- Hydrogen (Hydrogen) - <https://www.ieahydrogen.org/>
- Solar Heating and Cooling (SHC) - <https://www.iea-shc.org/>
- User-Centred Energy Systems - <https://userstcp.org/>
- Energy Storage (ECES) - <https://iea-es.org/>
- District heating and cooling (DHC) – <https://www.iea-dhc.org/home>
- Energy in Buildings and Communities (EBC) – <https://www.iea-ebc.org/>
- Bioenergy – <https://www.ieabioenergy.com/>
- Geothermal (Geothermal) - <http://iea-gia.org/>
- International Smart Grid Action Network (ISGAN) – <https://www.iea-isgan.org/>

### 3. Aims and Objectives

The primary aims of this commission are to ensure that:

- The activities of the TCPs are fully disseminated to their respective UK industries and researchers.
- The UK takes an active role in the participation, management and development of the TCPs and ensures their activities are beneficial for the UK.
- Activities across related TCPs are joined up, to avoid duplication and maximise added value through collaboration.

### 4. Tasks

Some of these tasks will be shared with the BEIS primary delegate. The division of responsibilities will be determined with the BEIS delegate, and include general tasks (Section 4.1) and additional TCP-specific tasks (Section 4.2). For lots 9 and 10, the alternate delegate is also to be the operating agent for an annex (Section 4.3).

The general tasks (Section 4.1) below should be considered a minimum requirement. The general tasks of the TCP alternate delegates are estimated to correspond to around 11 days per financial year. Additional tasks are active participation in annex work expected to represent 5-10 days per year, and chairing the TCPs expected to take up an additional 3-4 days per year.

The types of task vary across TCP and depend on the annual activities, location of meetings, and the number of new projects proposed in a given year. As this may vary by TCP and year, the scope and budget of the work is to be agreed with the BEIS delegate at the start of each year at a kick-off meeting. A BEIS TCP coordinator will manage the

<sup>1</sup> <https://www.gov.uk/government/collections/net-zero-innovation-portfolio>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPs				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





10 alternate delegate contracts, and will sign off the programme of work. For the bidding process, we present a pricing scenario in Section 16.2 based on a representative set of tasks for the alternate delegate role.

The tasks are summarised in Table 2.

**Table 2: Tasks and time requirement**

Type of task	Lots	Time requirement (days/year)	Description
General tasks	1-10	11 days minimum	This is the minimum requirement of the alternate delegate role. This includes participation in the Executive Committee and associated work and leading the National Team. See details of tasks in Section 4.1
Chairing the TCP	1-10	3-5 days	If elected at the ExCo. See further details in Section 4.2
Active participation in annex work	1-10	5-10 days	Could include participation in existing annexes or proposing new ones, data gathering, organising meetings, and report writing. Details in Section 4.2.
Operating agent for Mine Energy annex	9	~14 days	Technical lead for a research task on Mine Energy. Details in Section 4.3.
Operating agent for Flexibility Markets annex	10	~14 days	Technical lead for a research task on Flexibility Markets. Details in Section 4.3.

## 4.1 General tasks

This section describes the types of general tasks expected of the alternate delegate role. The total time indicated may vary depending on the year, the TCP, and the alternate delegate's profile.

### **Participation in the Executive Committee and associated work (between 6-10 days per year)**

This includes:

- Participate in the two Executive Committee meetings (ExCo) per year (requirement to attend at least one). These may be held in any TCP member country, therefore you should be able to travel anywhere as required. Each meeting typically lasts 1.5-3 days, and will vary depending on whether the meetings take place virtually or not. The annual travel budget is £1,750 which may influence which ExCo to attend. This does not need to be included in your pricing as there is a ring-fenced budget for travel.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- Participate in other ad hoc workshops/meetings where necessary, as part of your duties as an ExCo member.
- Provide expert review and comment on relevant TCP documents (including annexes) and proposals outside of ExCo meetings.
- Where appropriate, investigate opportunities to link up with other related TCPs for joint activities.
- Preparation and research for the annual report for the IEA, which involves gathering relevant national information on innovations in the TCP area, market developments, research progress, total UK funding, and summarising into a short report.
- Respond to requests asking for expert advice from TCP members.

### **Leading the UK National Team (between 2-5 days per year)**

For each TCP, a group of interested parties for that particular field are brought together to form a National Team. This group does not need to be formalised, but will provide active participation in the activities of the TCP, in particular research tasks or annexes. The group can include any interested parties e.g. manufacturers, researchers, government departments, trade bodies, consultancies etc. The tasks for the alternate delegate in regards to the National Team include:

- Work with the primary delegate from BEIS to establish this group if it is not already established.
- Act as the primary liaison between the TCP and the National Team, including co-ordinating participation of members of the National Team in research tasks/annexes and dissemination of TCP activities to the National Team.
- If not in place already, establish a regular method of communication between the TCP and the National Team e.g. an annual workshop.
- Organise and manage the regular communication between the TCP and the National Team.

## **4.2 TCP-specific tasks**

Please refer to the information provided in the supplier day pack for TCP specific information, and the individual TCP websites.

Some TCP alternate delegates may take on additional commitments, which will have been voted for at the Executive Committee meetings, which are not in the minimum requirement. The two typical types of additional task could include the following:

### **Chairing a TCP (between 3-5 days per year)**

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



If elected chair, the alternate delegate represents the IEA TCP at conferences and meetings with the IEA secretariat and governing bodies. The estimated additional time requirement is 3-4 days per year. TCPs for which the UK is currently chair will not necessarily keep the chair.

### **Active participation in an annex or specific task (between 5-10 days)**

The alternate delegate takes on the role of starting for a research programme, or actively supports another country leading a Programme of Work. This would involve organising the relevant working group meetings, producing and/or commissioning specific research outputs. Outputs are typically in the form of guidance documents, such as case studies, infographics, and short technical reports. This work can typically involve 5-10 days a year.

The UK is currently involved in several sub-tasks or annexes, which will be communicated to the alternate delegate upon handover at contract start to determine the scope of work.

### **4.3 Operating agent for annexes for Lots 9 and 10**

This procurement also includes the requirement for the alternate delegates for Lots 9 and 10 to act as operating agents for an annex. This is to maximise cooperation and links with the TCP. Participation in the annexes is subject to an annual vote at the Executive Committee meetings, and may be discontinued if objectives are completed. The evaluation criteria for Lots 9 and 10 are thus slightly different due to the general responsibilities of the role.

- Lot 9: To lead the Mine Water Energy task (estimated at 14 days per year). This would involve coordinating the organisation of three working group meetings, and producing a short report on international regulation, innovation and challenges to shallow mine energy geothermal sites. This annex work has been approved for 2022/23 by the ExCo and is expected to continue till March 2025 within the TCP Working Group 13 (Geothermal Heating and Cooling). The alternate delegate is expected to work closely with the mine water energy experts in the UK. The objectives of this annex work is to:
  - o Increase learning from international experiences of mine energy geothermal systems;
  - o Better understanding of regulatory environments in different countries;
  - o Gather best practice for technology deployment.
- Lot 10: To act as operating agent for the Flexibility Markets annex (estimated at 14 days per year). This will involve working with participants of the annex to coordinate delivery of the Programme of Work, including regular attendance at meetings, and sharing responsibilities with the BEIS Delegate. This will include coordinating the delivery of future programmes of work, organising and chairing monthly calls, and working closely with the ISGAN Secretariat on administrative tasks. The scope of this

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



annex includes all aspects of market design for power system flexibility: the whole range of market timescales, from long-term investment signals to second-to-second balancing and response; the whole physical system from large, centralised generation to behind-the-meter sources of flexibility in domestic settings; and interfaces with other vectors. The objectives of this annex are to:

- To enrich and disseminate participants' understanding of flexibility market design
- To create and curate an evidence base all can draw upon to support decision making in the flexibility market space
- To further the debate on best practice in market design

## 5. Outputs Required

Two specific outputs are required for Lots 1-10:

- An annual report for the IEA TCP on the state of the technology in the UK
- An annual report on TCP activities for the BEIS governing board

For lots 9 and 10 where the alternate delegate is also to take on a role of operating agent of a sub-task, the following additional outputs are also required:

- Lot 9: Report for Annex project 'Mine Water' (Geothermal TCP).
- Lot 10: Report for Annex project 'Flexibility Markets' (ISGAN TCP).

## 6. Ownership and Publication

As described in the terms and conditions, BEIS is to own all IP arising. The annual report on TCP activities for the BEIS governing board is not to be published publicly and is for internal monitoring purposes only. Outputs produced for the IEA TCP such as the annual country report, annex outputs are to be published on the relevant IEA TCP websites by the IEA TCP Secretariat.

## 7. Quality Assurance

The annual report is to be quality assured by the BEIS delegate. Any tasks designed for annexes will include a Quality Assurance process to be developed when relevant.

## 8. Timetable

The timetable varies according to each TCP and is voted on each year by the Executive Committee. ExCo meetings take place twice a year, and the alternate delegates are expected to attend. The meetings are every six months, usually in May/June and October/November. At the start of the contract, a workshop will be organised with BEIS and alternate delegates to encourage cross-TCP collaboration and maximise the potential of TCP participation.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



An annual report is due once a year, but the deadline varies by TCP. There may be other deadlines relating to annexes and national team meetings. The timetable is thus to be agreed with the BEIS delegate at the start of the contract, and will change over the 2.5 years depending on the working groups and annexes the delegates become involved in.

## 9. Challenges

NA

## 10. Ethics

All applicants will need to identify and propose arrangements for initial scrutiny and on-going monitoring of ethical issues.

We expect contractors to adhere to the following Government Social Research Principals:

- Sound application and conduct of social research methods and appropriate dissemination and utilisation of findings
- Participation based on valid consent
- Enabling participation
- Avoidance of personal harm
- Non-disclosure of identity and personal information

## 11. Working Arrangements

The contractor will name a specific individual to be the alternate delegate. The individual may be supported by a team (e.g. administrative, research support), but the bid should be priced for the individual only with a single day rate (which could include overheads and or costs for support staff). The individual will be the sole point of contact and will work with the BEIS delegate in all associated activities. The BEIS delegate will also be contract manager for the AD contract and QA the outputs. Regular meetings should take place between the BEIS and alternate delegates (typically every 2 months) for monitoring, quality assessment, and knowledge transfer. The BEIS TCP coordinator, overseeing the 10 TCPs, will review and approve the yearly proposed workplan, and review the outputs of the BEIS annual report.

## 12. Data Protection

The Contractor will be compliant with the Data Protection Legislation, as defined in the terms and conditions applying to this Invitation to Tender. A guide to The General Data Protection Regulation published by the Information Commissioner's Office can be found [here](#).

The only processing that the Contractor is authorised to do is listed in Annex B by BEIS, "the Authority" and may not be determined by the Contractor.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



### 13. Cyber Security

Any successful bidder should take reasonable cyber security precautions and ensure any IT equipment used when working on their respective TCPs is suitably secured (e.g. software patches are installed, and anti-virus software is up to date).

### 14. Skills and experience

BEIS would like the bidder to demonstrate that the nominated individual to be alternate delegate has the experience and capabilities to undertake the role. The tender response should include a detailed summary of the proposed individual's skills and experience, and clearly link them to the alternate delegate tasks. The individual can be supported by a team within the organisation, e.g. personal assistant, administrative staff, research staff. Such support should be entirely managed by the alternate delegate.

In particular, evidence and details are sought for the network of contacts available to the bidder within the relevant industry, their technical background and understanding of the technology area, and any other experience that makes them suitable for this role.

Evidence of experience for all required tasks must be demonstrated.

### 15. Consortium Bids

Consortium bids are not considered appropriate for this tender due to the nature of the requirement for an individual alternate delegate. If the individual is supported by a team (e.g. administrative or research staff), these cannot be from another organisation.

### 16. Budget and pricing scenario

#### 16.1 Budget

The maximum budget available per year is:

- For lots 1 to 8: £18,500/year
- For lots 9 and 10: £29,000/year

An additional budget of up to £1,750 (exc VAT) per financial year is available for travel. The rates for contractors to claim for T&S will be in line with BEIS standards. These are outlined in the T&S Rates (Annex E). The alternate delegate should discuss travel arrangements in advance of need with the BEIS delegate, and organise their own travel.

As the scope of work is likely to vary year-on-year and by TCP, the budget and scope of work would be agreed at the start each year at a kick-off meeting, and signed off by the BEIS TCP Coordinator. Price will be evaluated based on total price for the representative pricing scenario described in Section 16.2. Work will be paid on a time and materials basis upon completion of tasks agreed, linked to the delivery of indicative milestones. The indicative milestones are the

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



attendance of at least one of the executive committee meeting per year, regular contact with the BEIS delegate, and the production of the annual report for BEIS. Contractors should provide a consolidated day rate at which costs will be reimbursed. Invoices are expected to be annually or every 6 months, according to the contractor's preference, with at least one invoice each year, submitted towards the end of the financial year (March). The maximum inflation rate that will be applied to contracts will be 1.8% per financial year.

Cost will be a criterion against which bids will be assessed. Any bid price submitted that exceeds the price caps will be excluded from the competition.

In submitting full tenders, Contractors confirm in writing that the price offered will be held for a minimum of 60 calendar days from the date of submission. Any payment conditions applicable to the prime contractor must also be replicated with sub-contractors.

The Department aims to pay all correctly submitted invoices as soon as possible with a target of 10 days from the date of receipt and within 30 days at the latest in line with standard terms and conditions of contract.

## 16.2 Pricing scenario

As the alternate delegates for each TCP are expected to be able to do all tasks, the following representative pricing scenario has been developed for lots 1-10. Even though the alternate delegate may be supported by a team (e.g. for administrative or research tasks), the bidders should propose a single consolidated day rate which may include overhead costs or costs for support staff.

The pricing scenario should also be used as a basis for Question 4: Service Delivery Plan.

### General tasks (Representative of the minimum requirement 11 days)

- Attendance to ExCo Meetings (4 days a year)
- Gathering information for an annual report (2 days per year)
- TCP administration, meeting minutes, invoicing (1 day per year)
- Coordinating a National Team and relevant adhoc meetings (3 days per year)
- Producing a report of TCP activities for BEIS (1 day per year)

### Additional tasks (13 days)

- Chairing TCP (liaising with secretariat, developing strategy, representing the TCP at external meetings) (4 days per year)
- Developing a Programme of Work for new research project (5 days per year)
- Active participation in a sub-task led by another country (e.g. information gathering, fact sheet writing, data analysis) (4 days per year)

**For lots 9 and 10 only**, in addition, the following tasks should also be priced:

### Operating agent for an annex (14 days)

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- Attending annex group meetings, including meeting prep (3 days per year)
- Gathering information pertaining to the sub-task, e.g. costs, regulations, business models, technologies used (3 days per year)
- Report writing (6 days per year)
- Administrative tasks, such as invoicing, project management, sending minutes (2 days per year)

## 17. Evaluation of Tenders

Contractors are invited to submit full tenders of no more than 9 pages for Lots 1-8 and 12 pages for Lots 9-10, excluding declarations, reference lists, and CV. Tenders will be evaluated by at least three BEIS staff.

BEIS will select the bidder that scores highest against the criteria and weighting listed below:

- **Conflict of interest:** pass/fail. See Section C: Conflict of Interest of the ITT for further information.

### EVALUATION CRITERIA AND SCORING METHODOLOGY

Table 3 presents the evaluation criteria for Lots 1-8. Table 4 presents the evaluation criteria for Lots 9 and 10. The evaluation criteria differ for questions 1a, 1b, 2, 4 and pricing. The scoring criteria is presented in Table 5.

**Table 3 - Evaluation Criteria for lots 1-8**

<b>Criterion</b>	<b>Description</b>	<b>Weighting</b>
01	Technical experience in the TCP area.	35%
	01a – <b>Understanding of the sector in the UK and internationally</b> Please provide your interpretation of the challenges and opportunities in the technology area. Your answer can include (but is not limited to): markets, technologies, standards, regulations, innovations, research areas, knowledge gaps, barriers and issues? An excellent answer will be backed up by evidence (e.g. related publications, presentations, projects), and demonstrate the individual's	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





	<p>expertise both within the UK and internationally.</p> <p>The answer to this question is limited to 2 pages, excluding reference list. Anything beyond two pages will not be read, but the reference list will be cross-referenced.</p>	
	<p><b>01b – Developing research tasks and leading working groups</b></p> <p>Please provide evidence of expertise for participating and leading specific research tasks. Skills required include: setting up new tasks relative to the subject area, identifying gaps, preparing review reports, reviewing research proposals, chairing or participating in steering boards or international committees. An excellent answer will demonstrate ability through past examples.</p> <p>Based on your answer for 1a, please propose at least two research topics for annexes which could benefit from the IEA international platform to develop better understanding or deployment of the technology area.</p> <p>Please demonstrate your capability to chair at a level commensurate with the role i.e. at a UK/international level for relevant bodies such as BEIS or other leading institutions or bodies in their field.</p> <p>The answer to this question is limited to 2 pages, excluding reference list. Anything beyond two pages will not be read, but the reference list will be cross-referenced. A CV of max 3 pages must be included as an appendix to this question.</p>	15%
02	<p><b>Links with community in the technology area</b> – Part of the tasks as Alternate Delegate is to develop a National Team of UK experts in the technology area. Please present your links to individuals and organisations working in the technology area in the UK. Please</p>	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	<p>map out the links across industry, academia, NGOs and government. An excellent answer will be determined through evidence of participating in collaborative projects, with higher levels of assurance linked to evidence since 2015. Examples could include grant applications, participation in steering boards, etc.</p> <p>The answer to this question is limited to 2 pages. Anything beyond this will not be included in the assessment. Short supporting letters can be included as appendices.</p>	
03	<p><b>Knowledge transfer plan</b> – Part of the role requirement is to build knowledge and understanding of the technology area in BEIS. Please indicate a plan to impart technical knowledge and links with industry to the BEIS delegates and the IEA TCP as a whole. This answer can include suggestions of conferences to attend, presentations, jointly preparing reports, etc.</p> <p>The answer to this question is limited to 1 page. Anything beyond this will not be included in the assessment.</p>	10%
04	<p><b>Service delivery</b> – please indicate how you plan on delivering the requirement. The answer should explain how you plan on fitting the role with your existing responsibilities, your planned communication style with the BEIS delegate, and a plan for participating in IEA TCP annexes and working groups.</p> <p>The answer should use the tasks mapped out in the relevant pricing model (Section 16.2) as a basis of the service delivery plan. Excellent answers would explain how you plan on delivering the suggested tasks, how they fit with your working pattern, and include an example high level timetable, showing periods where you are</p>	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	likely to be unavailable (e.g. due to teaching).  The answer to this question is limited to 2 pages. Anything beyond this will not be included in the assessment.	
Pricing Criteria		
Pricing 01	As the scope of work may vary by TCP and year, and will be agreed at the kick off meeting. Cost will be evaluated for this bid using the pricing scenario described in Section 16.2, based on total price.  The price is capped at £18,500. Any price submitted which exceeds the price cap will be excluded from the competition.	15%
		100%

**Table 4 – Evaluation criteria for Lots 9 and 10**

<b>Criterion</b>	<b>Description</b>	<b>Weighting</b>
01	Technical experience in the TCP area.	35%
	<p><b>01a – Understanding of the sector in the UK and internationally</b></p> <p>Please provide your interpretation of the challenges and opportunities in the technology area. Your answer can include (but is not limited to): markets, technologies, standards, regulations, innovations, research areas, knowledge gaps, barriers and issues? An excellent answer will be backed up by evidence (e.g. related publications, presentations, projects), and demonstrate the individual's expertise both within the UK and internationally.</p> <p>Please provide your interpretation of challenges in the annex area in particular (Mine water energy systems for Lot 9 and Flexibility Markets for Lot 10).</p> <p>The answer to this question is limited to 3 pages, excluding reference list. Anything beyond three pages will not be read, but</p>	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPs				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	the reference list will be cross-referenced.	
	<p><b>01b – Developing research tasks and leading working groups</b></p> <p>Please provide evidence of expertise for participating and leading specific research tasks. Skills required include: setting up new tasks relative to the subject area, identifying gaps, preparing review reports, reviewing research proposals, chairing or participating in steering boards or international committees. An excellent answer will demonstrate ability through past examples.</p> <p>Based on your answer for 1a, please propose at least two research topics for annexes which could benefit from the IEA international platform to develop better understanding or deployment of the technology area.</p> <p>Please demonstrate your capability to chair at a level commensurate with the role i.e. at a UK/international level for relevant bodies such as BEIS or other leading institutions or bodies in their field.</p> <p>The answer to this question is limited to 2 pages, excluding reference list. Anything beyond two pages will not be read, but the reference list will be cross-referenced. A CV of max 3 pages must be included as an appendix to this question.</p>	15%
02	<p><b>Links with community in the technology area</b> – Part of the tasks as Alternate Delegate is to develop a National Team of UK experts in the technology area. Please present your links to individuals and organisations working in the technology area in the UK. Please map out the links across industry, academia, NGOs and government. An excellent answer will be determined through evidence of participating in collaborative projects, with higher levels of assurance linked to evidence since 2015.</p>	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA Tcps				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	<p>Examples could include grant applications, participation in steering boards, etc.</p> <p>Demonstration of links related to the annex area are required for an excellent answer.</p> <p>The answer to this question is limited to 3 pages. Anything beyond this will not be included in the assessment. Short supporting letters can be included as appendices.</p>	
03	<p><b>Knowledge transfer plan</b> – Part of the role requirement is to build knowledge and understanding of the technology area in BEIS. Please indicate a plan to impart technical knowledge and links with industry to the BEIS delegates and the IEA TCP as a whole. This answer can include suggestions of conferences to attend, presentations, jointly preparing reports, etc.</p> <p>The answer to this question is limited to 1 page. Anything beyond this will not be included in the assessment.</p>	10%
04	<p><b>Service delivery</b> – please indicate how you plan on delivering the requirement. The answer should explain how you plan on fitting the role with your existing responsibilities, your planned communication style with the BEIS delegate, and a plan for participating in IEA TCP annexes and working groups. The answer should include the likely working pattern, and periods where you are likely to be unavailable (e.g. due to teaching).</p> <p>The answer should use the tasks mapped out in the relevant pricing scenario (Section 16.2) as a basis of the service delivery plan. Excellent answers would explain how you plan on delivering the suggested tasks, how they fit with your</p>	20%

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	<p>working pattern, and include an example high level timetable, showing periods where you are likely to be unavailable (e.g. due to teaching).</p> <p>As this lot includes being the operating agent an annex, the service delivery plan should present a brief programme of work for leading the relevant annex. This can include key collaborators, suggestions of dates for meetings, and types of information that the AD intends to gather through the annex work.</p> <p>The answer to this question is limited to 3 pages. Anything beyond this will not be included in the assessment.</p>	
<b>Pricing Criteria</b>		
Pricing 01	<p>As the scope of work may vary by TCP and year, and will be agreed at the kick off meeting. Cost will be evaluated for this bid using the pricing scenario described in Section 16.2, based on total cost.</p> <p>The price is capped at £29,000. Any price submitted which exceeds the price cap will be excluded from the competition.</p>	15%
		100%

## Scoring Method

Tenders will be scored against each of the criteria above, according to the extent to which they meet the requirements of the tender. The meaning of each score is outlined in the table below.

The total score will be calculated by applying the weighting set against each criterion, outlined above; the maximum number of marks possible will be 100. Should any contractor score 1 in any of the criteria, they will be excluded from the tender competition.

The highest scoring bid in each lot will be offered a contract.

## Table 5 - Scoring Guidance

Score	Description
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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



1	Not Satisfactory: Proposal contains significant shortcomings and does not meet the required standard
2	Partially Satisfactory: Proposal partially meets the required standard, with one or more moderate weaknesses or gaps
3	Satisfactory: Proposal mostly meets the required standard, with one or more minor weaknesses or gaps.
4	Good: Proposal meets the required standard, with moderate levels of assurance
5	Excellent: Proposal fully meets the required standard with high levels of assurance.

## **Scoring for Pricing Evaluation**

**Price will be marked using proportionate pricing. Please see the example below.**

### **Marking proportionate to the lowest price**

Price will be scored as set out below. Any price submitted which exceeds the price cap will be excluded from the competition. For bids compliant with the price cap, there will be a maximum of e.g. 15 marks. The lowest priced bid will receive the full 15 marks, all other bids will then be marked as set out below.

### **Proportionate Pricing scoring example**

If 15% = 15 marks

Supplier	Price	Marks
1 (lowest bid)	£50,000	15
2	£60,000	$50/60 * 15 = 12.5$
3	£75,000	$50/75 * 15 = 10$

## **Structure of Tenders**

Contractors are strongly advised to structure their tender submissions to cover each of the criteria above. Complete the price schedule attached at Annex A, specifying the daily rate (ex-VAT) you will charge.

### **Bid Clarification**

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



After reviewing and evaluating the written proposals, BEIS may decide to hold bid clarifications with suppliers.

## Feedback

Feedback will be given in the unsuccessful letters or emails.

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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





## Section 3

### Further Information on Tender Procedure

Invitation to Tender for: Alternate delegates for ten International Energy Agency  
Technology Collaboration Programmes  
Tender Reference Number: prj\_798  
Deadline for Tender Responses: 2pm 1<sup>st</sup> September 2022

#### Contents:

A.	Definitions .....	34
B.	Data security .....	34
C.	Non-Collusion .....	35

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## A. 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.

## B. Data security

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

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Section 4 contains a "The UK General Data Protection Regulation Assurance Questionnaire for Contractors" (Declaration 5) 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.

## C. 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. Section 4 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.

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Section 4

### Declarations to be submitted by the Tenderer

Invitation to Tender for: Alternate delegates for ten International Energy Agency  
Technology Collaboration Programmes

Tender Reference Number: prj\_798

Deadline for Tender Responses: 2pm 1<sup>st</sup> September 2022

## Contents

Declaration 1: Statement of non-collusion .....	37
Declaration 2: Form of Tender .....	38
Declaration 3: Conflict of Interest .....	39
Declaration 4: Standard Selection Questionnaire .....	41
Declaration 5: The UK General Data Protection Regulation Assurance Questionnaire for Contractors).....	47

---

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Declaration 1: Statement of non-collusion

To: The Department for Business, Energy & Industrial Strategy

1. We recognise that the essence of competitive tendering is that the Department will receive a bona fide competitive tender from all persons tendering. We therefore certify that this is a bona fide tender and that we have not fixed or adjusted the amount of the tender or our rates and prices included therein by or in accordance with any agreement or arrangement with any other person.

2. We also certify that we have not done and undertake not to do at any time before the hour and date specified for the return of this tender any of the following acts:

- (a) communicate to any person other than the Department the amount or approximate amount of our proposed tender, except where the disclosure, in confidence, of the approximate amount is necessary to obtain any insurance premium quotation required for the preparation of the tender;
- (b) enter into any agreement or arrangement with any other person that he shall refrain for submitting a tender or as to the amount included in the tender;
- (c) offer or pay or give or agree to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person doing or having done or causing or having caused to be done, in relation to any other actual or proposed tender for the contract any act, omission or thing of the kind described above.

3. In this certificate, the word “person” shall include any person, body or association, corporate or unincorporated; and “any agreement or arrangement” includes any such information, formal or informal, whether legally binding or not.

.....  
Signature (duly authorised on behalf of the tenderer)

.....  
Print name

.....  
On behalf of (organisation name)

.....  
Date

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Declaration 2: Form of Tender

To: The Department for Business, Energy & Industrial Strategy

1. Having considered the invitation to tender and all accompanying documents (including without limitation, the terms and conditions of contract and the Specification) we confirm that we are fully satisfied as to our experience and ability to deliver the goods/services in all respects in accordance with the requirements of this invitation to tender.
2. We hereby tender and undertake to provide and complete all the services required to be performed in accordance with the terms and conditions of contract and the Specification for the amount set out in the Pricing Schedule.
3. We agree that any insertion by us of any conditions qualifying this tender or any unauthorised alteration to any of the terms and conditions of contract made by us may result in the rejection of this tender.
4. We agree that this tender shall remain open to be accepted by the Department for 8 weeks from the date below.
5. We understand that if we are a subsidiary (within the meaning of section 1159 of (and schedule 6 to) the Companies Act 2006) if requested by the Department we may be required to secure a Deed of Guarantee in favour of the Department from our holding company or ultimate holding company, as determined by the Department in their discretion.
6. We understand that the Department is not bound to accept the lowest or any tender it may receive.
7. We certify that this is a bona fide tender.

.....  
Signature (duly authorised on behalf of the tenderer)

.....  
Print name

.....  
On behalf of (organisation name)

.....  
Date

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



### Declaration 3: Conflict of Interest

I have nothing to declare with respect to any current or potential interest or conflict in relation to this research (or any potential providers who may be subcontracted to deliver this work, their advisers or other related parties). By conflict of interest, I mean, anything which could be reasonably perceived to affect the impartiality of this research, or to indicate a professional or personal interest in the outcomes from this research.

Signed .....

Name .....

Position .....

#### **OR**

I wish to declare the following with respect to personal or professional interests related to relevant organisations\*;

- X
- X

*Where a potential conflict of interest has been declared for an individual or organisation within a consortia, please clearly outline the role which this individual or organisation will play in the proposed project and how any conflict of interest has or will be mitigated.*

- X
- X

Signed .....

Name .....

Position .....

Please complete this form and return this with your ITT documentation - Nil returns **are** required.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



\* These may include (but are not restricted to);

- A professional or personal interest in the outcome of this research
- For evaluation projects, a close working, governance, or commercial involvement in the project under evaluation
- Current or past employment with relevant organisations
- Payment (cash or other) received or likely to be received from relevant organisations for goods or services provided (Including consulting or advisory fees)
- Gifts or entertainment received from relevant organisations
- Shareholdings (excluding those within unit trusts, pension funds etc) in relevant organisations
- Close personal relationship or friendships with individuals employed by or otherwise closely associated with relevant organisations

***All of the above apply both to the individual signing this form and their close family / friends / partners etc.***

If your situation changes during the project in terms of interests or conflicts, you must notify the Department straight away.

A DECLARATION OF INTEREST WILL NOT NECESSARILY MEAN THE INDIVIDUAL OR ORGANISATION CANNOT WORK ON THE PROJECT; BUT IT IS VITAL THAT ANY INTEREST OR CONFLICT IS DECLARED SO IT CAN BE CONSIDERED OPENLY.

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





## Declaration 4: Standard Selection Questionnaire

### **Financial Credit Checks:**

*BEIS will carry out financial due diligence on all preferred bidder(s). This may include, but not be limited to, credit checks and the detailed scrutiny of comprehensive reports resulting from said credit checks.*

*BEIS may need to check with bidder(s) that the information within the report is correct. BEIS may also request the latest accounts and financial information from the preferred bidder(s).*

*The outcome of BEIS financial due diligence may result in preferred bidder(s) not being awarded a Contract.*

### **Potential Supplier Information and Exclusion Grounds: Part 1 and Part 2.**

The standard Selection Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion<sup>2</sup>. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (we call this self-cleaning).

A completed declaration of Part 1 and Part 2 provides a formal statement that the organisation making the declaration has not breached any of the exclusions grounds. Consequently we require all the organisations that you will rely on to meet the selection criteria to provide a completed Part 1 and Part 2. For example these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria. This means that where you are joining in a group of organisations, including joint ventures and partnerships, each organisation in that group must complete one of these self-declarations. Sub-contractors that you rely on to meet the selection criteria must also complete a self-declaration (although sub-contractors that are not relied upon do not need to complete the self-declaration).

When completed, this form is to be sent back to the contact point given in the procurement documents along with the selection information requested in the procurement documentation.

*Alternatively you can submit the completed Exclusion Grounds of the [EU ESPD \(Part III\)](#) as a downloaded XML file to the buyer contact point along with the selection information requested in the procurement documentation.*

### **Supplier Selection Questions: Part 3**

The procurement document will provide instructions on the selection questions you need to respond to and how to submit those responses. If you are bidding on behalf of a group (consortium) or you intend to use sub-contractors, you should complete all of the selection questions on behalf of the consortium and/or any sub-contractors.

<sup>2</sup> For the list of exclusion please see

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/551130/List\\_of\\_Mandatory\\_and\\_Discretionary\\_Exclusions.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf)

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



If the relevant documentary evidence referred to in the Selection Questionnaire is not provided upon request and without delay we reserve the right to amend the contract award decision and award to the next compliant bidder.

### **Consequences of misrepresentation**

If you seriously misrepresent any factual information in filling in the Selection Questionnaire, and so induce an authority to enter into a contract, there may be significant consequences. You may be excluded from the procurement procedure, and from bidding for other contracts for three years. If a contract has been entered into you may be sued for damages and the contract may be rescinded. If fraud, or fraudulent intent, can be proved, you or your responsible officers may be prosecuted and convicted of the offence of fraud by false representation, and you must be excluded from further procurements for five years.

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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Alternate delegates for ten International Energy Agency Technology Collaboration Programmes

prj\_798

### OPEN PROCUREMENT

#### Notes for completion

1. The “authority” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to invite suitable candidates to participate in this procurement process.
2. “You” / “Your” refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the “regulations”) and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.
4. The authority recognises that arrangements set out in section 1.2 of the standard Selection Questionnaire, in relation to a group of economic operators (for example, a consortium) and/or use of sub-contractors, may be subject to change and will, therefore, not be finalised until a later date. The lead contact should notify the authority immediately of any change in the proposed arrangements and ensure a completed Part 1 and Part 2 is submitted for any new organisation relied on to meet the selection criteria. The authority will make a revised assessment of the submission based on the updated information.
5. For Part 1 and Part 2 every organisation that is being relied on to meet the selection must complete and submit the self-declaration.
6. For answers to Part 3 - If you are bidding on behalf of a group, for example, a consortium, or you intend to use sub-contractors, you should complete all of the questions on behalf of the consortium and/ or any sub-contractors, providing one composite response and declaration.

The authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Part 1: 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	Potential supplier information	
Question number	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 a) public limited company b) limited company c) limited liability partnership d) other partnership e) sole trader f) third sector g) 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 <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
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 <input type="checkbox"/> No <input type="checkbox"/>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



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, and if so which one) a) Voluntary Community Social Enterprise (VCSE) b) Sheltered Workshop c) Public service mutual	
1.1(m)	Are you a Small, Medium or Micro Enterprise (SME) <sup>3</sup> ?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(n)	Details of Persons of Significant Control (PSC), where appropriate: <sup>4</sup> - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - 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. <sup>5</sup>  (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)	

<sup>3</sup> See EU definition of SME: <http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/>

<sup>4</sup> UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. [See PSC guidance](#).

<sup>5</sup> Central Government contracting authorities should use this information to have the PSC information for the preferred supplier checked before award.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	<ul style="list-style-type: none"><li>- Head office DUNS number (if applicable)</li><li>- Head office VAT number (if applicable)</li></ul> <p>(Please enter N/A if not applicable)</p>	
1.1(p)	<p>Details of ultimate parent company:</p> <ul style="list-style-type: none"><li>- Full name of the ultimate parent company</li><li>- Registered office address (if applicable)</li><li>- Registration number (if applicable)</li><li>- Head office DUNS number (if applicable)</li><li>- Head office VAT number (if applicable)</li></ul> <p>(Please enter N/A if not applicable)</p>	

Please note: A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant in control of them.

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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Please provide the following information about your approach to this procurement:

Section 1	Bidding model					
Question number	Question	Response				
1.2(a) - (i)	Are you bidding as the lead contact for a group of economic operators?	Yes <input type="checkbox"/> No <input type="checkbox"/> 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 and 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) - (ii)	Name of group of economic operators (if applicable)					
1.2(a) - (iii)	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 <input type="checkbox"/> No <input type="checkbox"/>				
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 number					
	Type of organisation					
	SME (Yes/No)					

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	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					

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

I am aware of the consequences of serious misrepresentation.

Section 1	Contact details and declaration	
Question number	Question	Response
1.3(a)	Contact name	
1.3(b)	Name of organisation	
1.3(c)	Role in organisation	
1.3(d)	Phone number	
1.3(e)	E-mail address	
1.3(f)	Postal address	
1.3(g)	Signature (electronic is acceptable)	
1.3(h)	Date	

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





## Part 2: 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	Grounds for mandatory exclusion	
Question number	Question	Response
2.1(a)	<b>Regulations 57(1) and (2)</b> The detailed grounds for mandatory exclusion of an organisation are set out on this <a href="#">web page</a> , 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 been convicted anywhere in the world of any of the offences within the summary below and listed on the <a href="#">webpage</a> .	
	Participation in a criminal organisation.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Corruption.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Fraud.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Terrorist offences or offences linked to terrorist activities	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Money laundering or terrorist financing	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Child labour and other forms of trafficking in human beings	Yes <input type="checkbox"/> No <input type="checkbox"/> 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.  Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,  Identity of who has been convicted	

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	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 <input type="checkbox"/> No <input type="checkbox"/>
2.3(a)	<b>Regulation 57(3)</b> 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 <input type="checkbox"/> No <input type="checkbox"/>
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.	

Please 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.

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Section 3		Grounds for discretionary exclusion
	Question	Response
3.1	<p><b>Regulation 57 (8)</b></p> <p>The detailed grounds for discretionary exclusion of an organisation are set out on this <a href="#">web page</a>, which should be referred to before completing these questions.</p> <p>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.</p>	
3.1(a)	Breach of environmental obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1 (b)	Breach of social obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1 (c)	Breach of labour law obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(d)	Bankrupt or is the subject of 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 <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(e)	Guilty of grave professional misconduct?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(f)	Entered into agreements with other economic operators aimed at distorting competition?	Yes <input type="checkbox"/> No <input type="checkbox"/> 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 <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(h)	Been involved in the preparation of the procurement procedure?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(i)	Shown significant or persistent deficiencies in the performance of a substantive	Yes <input type="checkbox"/> No <input type="checkbox"/>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	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?	If yes please provide details at 3.2
3.1(j)	Please answer the following statements	
3.1(j) - (i)	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.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) - (ii)	The organisation has withheld such information.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) -(iii)	The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j)-(iv)	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 to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.	Yes <input type="checkbox"/> No <input type="checkbox"/> 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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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Part 3: Selection Questions<sup>6</sup>

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 <b>one</b> of the following: answer with Y/N in the relevant box.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	(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 <input type="checkbox"/> No <input type="checkbox"/>
	(b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	(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 <input type="checkbox"/> No <input type="checkbox"/>
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 <input type="checkbox"/> No <input type="checkbox"/>

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		

<sup>6</sup> [See Action Note 8/16 Updated Standard Selection Questionnaire](#)

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



<b>5.1</b>	Are you able to provide parent company accounts if requested to at a later stage?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>5.2</b>	If yes, would the parent company be willing to provide a guarantee if necessary?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>5.3</b>	If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Section 6</b>	<b>Technical and Professional Ability</b>	
<b>6.1</b>	<p><b>Relevant experience and contract examples</b></p> <p>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.</p> <p>The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.</p> <p>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).</p> <p>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.</p> <p>If you cannot provide examples see question 6.3</p>	

	Contract 1	Contract 2	Contract 3
<b>Name of customer organisation</b>			
<b>Point of contact in the organisation</b>			
<b>Position in the organisation</b>			

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



<b>E-mail address</b>			
<b>Description of contract</b>			
<b>Contract Start date</b>			
<b>Contract completion date</b>			
<b>Estimated contract value</b>			

<b>6.2</b>	<p>Where you intend to sub-contract a proportion of the contract, please demonstrate how you have previously maintained healthy supply chains with your sub-contractor(s)</p> <p>Evidence should include, but is not limited to, details of your supply chain management tracking systems to ensure performance of the contract and including prompt payment or membership of the UK Prompt Payment Code (or equivalent schemes in other countries)</p>

<b>6.3</b>	<p>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.</p>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Section 7 Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015 <sup>7</sup>		
7.1	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
7.2	If you have answered yes to question 1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015?	Yes <input type="checkbox"/> Please provide relevant the url ...  No <input type="checkbox"/> Please provide an explanation

Section 8 The UK General Data Protection Regulation (UK GDPR) <sup>8</sup>		
8.1	<p>Compliance with the UK GDPR is a mandatory requirement for all contracts or agreements that involve the transfer and processing of personal data from 01 January 2021. Is your organisation be compliant with the UK GDPR and all Data Protection Legislation (as defined in the terms and conditions applying to this Invitation to Tender) in regards to the processing required under this contract by the time of contract award?</p> <p>Contractors are also required to complete Declaration 5: The UK General Data Protection Regulation Assurance Questionnaire for Contractors, 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</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

<sup>7</sup> [Procurement Policy Note 9/16 Modern Slavery Act 2015](#)

<sup>8</sup> [Procurement Policy Note 02/18 Changes to Data Protection Legislation & General Data Protection Regulation](#)

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





	successful, the Authority reserves the right to exclude the bidder from this procurement.	
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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## 9. Additional Questions

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage.

Section 9	Additional Questions
9.1	<b>Insurance</b>
a.	<p>Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below: Y/N</p> <p>Employer's (Compulsory) Liability Insurance = £5,000,000</p> <p>Public Liability Insurance = £5,000,000 Professional Indemnity Insurance = £2,000,000</p> <p>*It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders.</p>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Declaration 5: The UK General Data Protection Regulation Assurance Questionnaire for Contractors

Please fill in the questionnaire in the link below.



Declaration\_5\_-\_UK\_  
General\_Data\_Protec

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Annex A: Pricing Schedule

Please provide a breakdown of costs to deliver the pricing scenario for one year (Oct 22- Oct 23). The daily rates and item charges provided in the schedule will increase by a maximum of 1.8% per year for inflation.

Travel budget is excluded from the pricing schedule.

### **Part A – Staff/project team charges**

<b><u>Name/Grade/level of staff</u></b>	<b><u>Daily rate (ex VAT)</u></b>	<b><u>No. days offered over one year for task in pricing scenario</u></b>	<b><u>Tasks to be undertaken on this project</u></b>	<b><u>Total price offered per staff member</u></b>
	£			£
	£			£
	£			£
	£			£
	£			£
<b>Sub-total</b>				<b>£</b>

### **Part B – Non-staff/project team charges**

<b><u>Item</u></b>	<b><u>No. of items</u></b>	<b><u>Price per item (ex VAT)</u></b>	<b><u>Total price per offered</u></b>
		£	£
		£	£
		£	£
		£	£
		£	£
<b>Sub-total</b>			<b>£</b>

### **Part C – Full price offered**

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



<b>Sub-total (Part A + Part B)</b>	<b>£</b>
<b>VAT</b>	<b>£</b>
<b>TOTAL (Sub-total + VAT)</b>	<b>£</b>

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Annex B: Processing, Personal Data and Data Subjects

(1) The contact details of the Authority's Data Protection Officer are:

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)

(2) The contact details of the Contractor's Data Protection Officer (or if not applicable, details of the person responsible for data protection in the organisation) are: .....

(3) The Contractor shall comply with any further written instructions with respect to processing by the Authority.

(4) Any such further instructions shall be incorporated into this Annex B.

Description	Details
Subject matter of the processing	<p>The processing of names and business contact details of staff of both the Authority and the Contractor will be necessary to deliver the services exchanged during the course of the Contract, and to undertake contract and performance management.</p> <p>The Contract itself will include the names and business contact details of staff of both the Authority and the Contractor involved in managing the Contract.</p> <p>The processing of names and business contact details of experts in the IEA TCP field will be needed in order to ensure the contractor can effectively deliver the contract to build/maintain a National Team of experts.</p>

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Duration of the processing	Processing will take place from the start of the contract, for the duration of the Contract. Data will be transferred back to BEIS and stored within BEIS at the end of the contract. The Contract will end on 31 <sup>st</sup> March 2025.
Nature and purposes of the processing	<p>The nature of the processing will include collection, recording, organisation, structuring, storage.</p> <p>Processing takes place for the purposes of contacting experts and tracking attendance at meetings.</p> <p>The nature of processing will include the storage and use of names and business contact details of staff of both the Authority and the Contractor as necessary to deliver the services and to undertake contract and performance management. The Contract itself will include the names and business contact details of staff of both the Authority and the Contractor involved in managing the Contract.</p>
Type of Personal Data	<p>Names, business telephone numbers and email addresses, office location and position of staff of both the Authority and the Contractor as necessary to deliver the services and to undertake contract and performance management. The Contract itself will include the names and business contact details of staff of both the Authority and the Contractor involved in managing the Contract.</p> <p>Names and business email addresses of experts will be stored on a secure BEIS Sharepoint folder, but no further personal data will be stored or requested.</p>
Categories of Data Subject	<p>Staff of the Authority and the Contractor, including where those employees are named within the Contract itself or involved within contract management.</p> <p>Names and business email addresses of experts in the field.</p>
Plan for return and destruction of the data once the processing is complete UNLESS requirement under European member state law to preserve that type of data	The Contractor will provide the Authority with a complete and uncorrupted version of the Personal Data in electronic form (or such other format as reasonably required by the Authority) and erase from any computers, storage devices and storage media that are to be retained by the Contractor after the

Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



	<p>expiry of the Contract. The Contractor will certify to the Authority that it has completed such deletion.</p> <p>Where Personal Data is contained within the Contract documentation, this will be retained in line with the Department's privacy notice found within the Invitation to Tender.</p>
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BEIS will be relying on consent as the relevant legal basis of processing. The Contractor will ensure that all communications requesting the provision on personal data allow for the data subject to provide clear, affirmative, informed, freely given and unambiguous consent, which requires a positive 'opt-in.' The Contractor will have mechanisms in place to ensure that consent is recorded and shown through an audit trail.

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Classification:	OFFICIAL				
Document Title:	<b>ITT Pack for Alternate delegates for ten IEA TCPS</b>				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





## Annex C: Exclusion Grounds

### Mandatory Exclusion Grounds

**Public Contract Regulations 2015 R57(1), (2) and (3)**

**Public Contract Directives 2014/24/EU Article 57(1)**

#### Participation in a criminal organisation

Participation offence as defined by section 45 of the Serious Crime Act 2015

Conspiracy within the meaning of

- section 1 or 1A of the Criminal Law Act 1977 or
- article 9 or 9A of the Criminal Attempts and Conspiracy (Northern Ireland) Order 1983

where that conspiracy relates to participation in a criminal organisation as defined in Article 2 of Council Framework Decision 2008/841/JHA on the fight against organised crime;

#### Corruption

Corruption within the meaning of section 1(2) of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906;

The common law offence of bribery;

Bribery within the meaning of sections 1, 2 or 6 of the Bribery Act 2010, or section 113 of the Representation of the People Act 1983;

#### Fraud

Any of the following offences, where the offence relates to fraud affecting the European Communities' financial interests as defined by Article 1 of the convention on the protection of the financial interests of the European Communities:

- the common law offence of cheating the Revenue;
- the common law offence of conspiracy to defraud;
- fraud or theft within the meaning of the Theft Act 1968, the Theft Act (Northern Ireland) 1969, the Theft Act 1978 or the Theft (Northern Ireland) Order 1978;

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- fraudulent trading within the meaning of section 458 of the Companies Act 1985, article 451 of the Companies (Northern Ireland) Order 1986 or section 993 of the Companies Act 2006;
- fraudulent evasion within the meaning of section 170 of the Customs and Excise Management Act 1979 or section 72 of the Value Added Tax Act 1994;
- an offence in connection with taxation in the European Union within the meaning of section 71 of the Criminal Justice Act 1993;
- destroying, defacing or concealing of documents or procuring the execution of a valuable security within the meaning of section 20 of the Theft Act 1968 or section 19 of the Theft Act (Northern Ireland) 1969;
- fraud within the meaning of section 2, 3 or 4 of the Fraud Act 2006;
- the possession of articles for use in frauds within the meaning of section 6 of the Fraud Act 2006, or the making, adapting, supplying or offering to supply articles for use in frauds within the meaning of section 7 of that Act;

### **Terrorist offences or offences linked to terrorist activities**

Any offence:

- listed in section 41 of the Counter Terrorism Act 2008;
- listed in schedule 2 to that Act where the court has determined that there is a terrorist connection;
- under sections 44 to 46 of the Serious Crime Act 2007 which relates to an offence covered by the previous two points;

### **Money laundering or terrorist financing**

Money laundering within the meaning of sections 340(11) and 415 of the Proceeds of Crime Act 2002

An offence in connection with the proceeds of criminal conduct within the meaning of section 93A, 93B or 93C of the Criminal Justice Act 1988 or article 45, 46 or 47 of the Proceeds of Crime (Northern Ireland) Order 1996

### **Child labour and other forms of trafficking human beings**

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



An offence under section 4 of the Asylum and Immigration (Treatment of Claimants etc.) Act 2004;

An offence under section 59A of the Sexual Offences Act 2003

An offence under section 71 of the Coroners and Justice Act 2009;

An offence in connection with the proceeds of drug trafficking within the meaning of section 49, 50 or 51 of the Drug Trafficking Act 1994

An offence under section 2 or section 4 of the Modern Slavery Act 2015

### **Non-payment of tax and social security contributions**

Breach of obligations relating to the payment of taxes or social security contributions that has been established by a judicial or administrative decision.

Where any tax returns submitted on or after 1 October 2012 have been found to be incorrect as a result of:

- HMRC successfully challenging the potential supplier under the General Anti – Abuse Rule (GAAR) or the “Halifax” abuse principle; or
- a tax authority in a jurisdiction in which the potential supplier is established successfully challenging it under any tax rules or legislation that have an effect equivalent or similar to the GAAR or “Halifax” abuse principle;
- a failure to notify, or failure of an avoidance scheme which the supplier is or was involved in, under the Disclosure of Tax Avoidance Scheme rules (DOTAS) or any equivalent or similar regime in a jurisdiction in which the supplier is established

### **Other offences**

Any other offence within the meaning of Article 57(1) of the Directive as defined by the law of any jurisdiction outside England, Wales and Northern Ireland

Any other offence within the meaning of Article 57(1) of the Directive created after 26<sup>th</sup> February 2015 in England, Wales or Northern Ireland

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Discretionary exclusions

### Obligations in the field of environment, social and labour law.

Where an organisation has violated applicable obligations in the fields of environmental, social and labour law established by EU law, national law, collective agreements or by the international environmental, social and labour law provisions listed in Annex X to the Directive (see copy below) as amended from time to time; including the following:-

- Where the organisation or any of its Directors or Executive Officers has been in receipt of enforcement/remedial orders in relation to the Health and Safety Executive (or equivalent body) in the last 3 years.
- In the last three years, where the organisation has had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination.
- In the last three years, where any finding of unlawful discrimination has been made against the organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or incomparable proceedings in any jurisdiction other than the UK).
- Where the organisation has been in breach of section 15 of the Immigration, Asylum, and Nationality Act 2006;
- Where the organisation has a conviction under section 21 of the Immigration, Asylum, and Nationality Act 2006;
- Where the organisation has been in breach of the National Minimum Wage Act 1998.

### Bankruptcy, insolvency

Bankrupt or is the subject of 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;

### Grave professional misconduct

Guilty of grave professional misconduct

### Distortion of competition

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



Entered into agreements with other economic operators aimed at distorting competition

### **Conflict of interest**

Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure

### **Been involved in the preparation of the procurement procedure.**

### **Prior performance issues**

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.

### **Misrepresentation and undue influence**

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 to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.

### **Additional exclusion grounds**

### **Breach of obligations relating to the payment of taxes or social security contributions.**

### **ANNEX X Extract from Public Procurement Directive 2014/24/EU**

### **LIST OF INTERNATIONAL SOCIAL AND ENVIRONMENTAL CONVENTIONS REFERRED TO IN ARTICLE 18(2) —**

- ILO Convention 87 on Freedom of Association and the Protection of the Right to Organise;
- ILO Convention 98 on the Right to Organise and Collective Bargaining;
- ILO Convention 29 on Forced Labour;
- ILO Convention 105 on the Abolition of Forced Labour;
- ILO Convention 138 on Minimum Age;
- ILO Convention 111 on Discrimination (Employment and Occupation);

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- ILO Convention 100 on Equal Remuneration;
- ILO Convention 182 on Worst Forms of Child Labour;
- Vienna Convention for the protection of the Ozone Layer and its Montreal Protocol on substances that deplete the Ozone Layer;
- Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal (Basel Convention);
- Stockholm Convention on Persistent Organic Pollutants (Stockholm POPs Convention)
- Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade (UNEP/FAO) (The PIC Convention) Rotterdam, 10 September 1998, and its 3 regional Protocols.

### **Consequences of misrepresentation**

A serious misrepresentation which induces a contracting authority to enter into a contract may have the following consequences for the signatory that made the misrepresentation:-

- The potential supplier may be excluded from bidding for contracts for three years, under regulation 57(8)(h)(i) of the PCR 2015;
- The contracting authority may sue the supplier for damages and may rescind the contract under the Misrepresentation Act 1967.
- If fraud, or fraudulent intent, can be proved, the potential supplier or the responsible officers of the potential supplier may be prosecuted and convicted of the offence of fraud by false representation under s.2 of the Fraud Act 2006, which can carry a sentence of up to 10 years or a fine (or both).
- If there is a conviction, then the company must be excluded from procurement for five years under reg. 57(1) of the PCR (subject to self-cleaning).

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Annex D: Terms and conditions

[Short form contract](#)

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Annex E: Expenses policy and eligible costs guidance

### 1. Background to guidance

[Managing Public Money](#) (2022), HM Treasury guidance on the use of public funds, demonstrates the Government's clear stated policy that taxpayers' money is used as intended. In order to **increase transparency, clarity** and **consistency** in the spending of funds this eligible expenditure guidance forms part of this contract. In the event of any conflict between the contract or agreement terms and conditions and this document the contract or agreement will take precedence.

This guidance document provides details of both eligible expenditure and items of expenditure that are expressly ineligible and should be referred to when submitting the budget template supporting your proposal. The guidance will help organisations calculate the full cost of a particular project or service, including an appropriate share of all relevant support services and other overheads/indirect costs as appropriate.

The Authority reserves the right to make changes to this document from time to time in line with developments in Government policy.

### 2. Principles of eligibility

The contract amount is to be used solely for costs included in the budget for the delivery of the outputs and outcomes in the log frame or agreed results model framework. These costs must:

- Be actually incurred by the recipient
- Be incurred within the period set out
- Be indicated within the cost budget
- Be incurred in connection with and necessary for implementation
- Be identifiable, verifiable and recorded in the recipient's accounts in accordance with applicable accounting standards and with the beneficiary's usual cost accounting practices
- Be compliant with applicable national law on taxes, labour and any all other relevant national law
- Be reasonable, justifiable and compliant with the principles of sound financial management

#### Expenditure cost categories containing specific eligible and ineligible definitions

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





**are defined within this guidance and the budget should be completed in line with the guidance.**

### **3. Foreign exchange**

All costs within the budget must be in GBP. Suppliers operating in another currency must convert to GBP at the spot FX rate and the source and value of any exchange rates used should be referenced in the budget.

### **4. Ineligible costs (applicable to all budget categories)**

The following expenditure items are explicitly ineligible across all expenditure cost categories unless permitting them is a specific requirement of the contract (this list is not exhaustive and does not override activities which are deemed eligible and explicitly agreed as part of the contract):

- Lobbying UK government, i.e. activities which aim to influence or attempt to influence Parliament, UK government or political activity, or UK legislative or regulatory action
- Activities which directly enable one part of government to challenge another on topics unrelated to the agreed purpose of the contract
- To petition UK Government for additional funding
- Activities which may lead to civil unrest
- Activities which discriminate against any group on the basis of age, gender reassignment, disability, race, colour, ethnicity, sex and sexual orientation, pregnancy and maternity, religion or belief
- Interest payments or service charge payments for finance leases
- Gifts
- Statutory fines, criminal fines or penalties
- Payments for works or activities that are fully funded by other sources whether in cash or in kind, for example if premises are provided free of charge, BEIS will not contribute to a notional rent
- Activities in breach of UK Legislation on Subsidy Control
- Bad debts to related parties
- Payments for unfair dismissal or other compensation
- Replacement or refund of any funds lost to fraud, corruption, bribery, theft, terrorist financing or other misuse of funds
- The cost of any fines or charges applied by local Governments or by any local public authority
- Costs or benefits provided to any public official or third party if there is a high likelihood that the payment or benefit was for improper purposes (e.g. facilitation payments)
- Fundraising (with the exception of any agreed allocated costs not attributable to the project (indirect costs))
- Foreign exchange as a standalone budget line
- Contingency or risk premium
- Depreciation (with the exception of any agreed allocated indirect costs)
- Debt repayment

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- Costs associated with preparing bid or commercial proposal prior to a formal agreement being executed or in the preparation of proposals for the take up of contract extension options
- Costs incurred prior to a formal agreement being executed
- **Unless directly attributable to the programme**, advocacy and campaigning, marketing and communications, policy, retainer fees, capital expenditure, land, bank charges and insurance (unless, by exception, explicitly agreed in writing in advance).<sup>9</sup>

Additional exclusions relating to specific expenditure cost categories are detailed in this guidance and are mandated in addition to the above general ineligible costs. In case of any doubt, the partner or potential supplier should consult BEIS in advance.

## 5. Expenditure cost categories

In an organisation there are two types of costs that are incurred as a result of running a project or service: Direct Programme Costs and Indirect Costs.

**Direct Programme Costs** are subdivided further into two types of Direct Costs:

- (a) **Direct project costs:** These are all the costs that are clearly and directly *incurred because of the project*. Typically, they include the salaries of project staff, their travel and subsistence, project materials, and all other costs easily identifiable as part of the project.
- (b) **Directly attributable project costs:** These are all the costs that are clearly and directly *attributable to the project*. Typically, they include country office resources specifically allocated to the project.

**Indirect costs** comprise those overhead costs that are not attributable to a project. These costs are incurred by an organisation in order to support the projects that it runs.

## 6. Direct programme costs

Direct programme costs are activities and costs directly incurred in the delivery and implementation of the programme and are directly linked to specific project outcomes and results. This generally includes frontline delivery costs and programme management and support costs.

### 6.1. Staff costs (including payroll taxes and benefits)

All individuals working under an employment contract, a direct contract (consultant), a sub-contractor or an individual seconded and assigned to the programme are eligible costs. Each salaried and non-salaried staff member should be assigned a role and the daily fee

<sup>9</sup> There are limited circumstances where it is appropriate to include insurance costs, for example to meet legal obligations or where doing so provides value for money (this is an extract from [Managing Public Money](#))

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



rate should be individually listed:

The daily fee rate is deemed to cover the cost of salary remuneration and benefits including superannuation (pension) and payroll taxes. If the cost is that of a sub-contractor, the daily fee rate will be the total invoiced cost chargeable to the project. A line item stating total staff costs will not be accepted.

BEIS will only reimburse productive days' work.

You should include details in your budget where time is being donated to programmes at no charge (in-kind contributions).

## 6.2. Management fees

The costs incurred by the Lead Organisation of managing both the recruitment and project work of external consultants and delivery partner programme staff where these are significant – i.e. they result in specific additional direct programme costs that are in excess of normal organisational establishment cost levels are eligible costs.

## 6.3. Frontline programme delivery costs

Frontline delivery expenditure includes commodities for beneficiaries or participants, transport of commodities (excluding vehicles which are capital expenditure and driver salaries which are included under travel costs, but including freight and logistics), storage of commodities, training and associated costs for beneficiaries or participants, disbursements to beneficiaries or participants, and any other frontline delivery costs associated with the delivery of programme outputs. This excludes staff costs, travel accommodation and subsistence, and capital expenditure which should be detailed separately under expenses.

## 6.4. Capital expenditure items

Capital expenditure includes specialist equipment, office furniture and equipment, standard and off-road motor vehicles and any other project related equipment. Any aspect of capital expenditure included must be fully justified as contributing to the sustainable outcome of the project. The cost should be recorded in the year in which the purchase is planned; do not spread the cost of a new purchase over the lifetime of the project. **Depreciation is not an allowable expense.**

Ownership of any capital items bought using BEIS funds is retained by BEIS throughout the lifetime of the project. The future use of an item will be discussed and agreed on project completion.

There is a requirement for a programme asset register to be maintained for all assets purchased at a value of £500 or more.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## 6.5. Travel, subsistence and accommodation

Travel undertaken for delivering the programme (including that related to monitoring, evaluation and learning activities) are eligible costs. This includes air, rail, car hire and other travel costs, hotel and accommodation costs, subsistence, travel management fees, travel documentation costs (e.g. passport/visa costs), travel vaccinations. The budget should include as much information as possible about travel plans.

**BEIS is committed to working towards Net Zero both domestically and internationally. As such all BEIS suppliers should look to minimise travel as much as possible. Where travel cannot be avoided the greenest option should be chosen.**

### 6.5.1. Ineligible expenses

The following are ineligible expenses and may not be claimed. Exceptions must be agreed in writing with your BEIS contract or agreement manager.

- Alcohol
- Tobacco
- Personal entertainment/recreation or travel
- Per diems (N.B. at cost accommodation and subsistence can still be paid for supported by receipts)
- Business and first-class travel or fully flexible tickets for flights or ground transportation
- Clothing
- Laundry
- Excess baggage
- Extra legroom
- Other travel facilitation costs e.g. charges to select a seat in advance of travel

### 6.5.2. Travel

Travel and living expenses will be paid at a rate consistent with the [HMRC's schedule of rates](#)<sup>10</sup>.

All journeys by rail or air will be budgeted by a class of travel that is no more than “**standard economy**” unless higher travel classes are representative of improved value for money or are required to adhere to specific legislation, for example the Equality Act 2010. Your BEIS representative will confirm if this is appropriate, and no travel should be booked in a class higher than “standard economy” **without express written permission**. First class travel will not be permitted under any circumstances. If a supplier books anything other than standard economy travel without prior written approval, these costs are incurred at their own risk and expense.

<sup>10</sup> <https://www.gov.uk/government/publications/scale-rate-expenses-payments-employee-travelling-outside-the-uk> -

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



The most economical form of transportation must always be used. The use of taxis or car rental where safe, frequent and reliable public transport exists must be justified.

For car journeys less than or equal to 10,000 miles in a personal car, these will be reimbursed at 45p per mile.

### 6.5.3. Subsistence

Alcohol and tobacco are not allowable subsistence items under any circumstances.

Where food, refreshments, transportation, accommodation or other expenses are required for the participants of a workshop, conference, seminar etc. (including staff of the supplier or project partners) all costs must be reasonable and follow these guidelines.

In the event that a supplier is not able to stick to these rates they must contact their BEIS contract manager to discuss and provide a rationale for any exemption. Exemptions must be provided in writing by BEIS in advance of any above-rate expenses being incurred. In the event that a supplier incurs above-rate expense without prior written approval, these costs are incurred at their own risk and expense.

As per the guidance in this document, expenses are to be claimed and paid for based on actual expenses incurred supported by receipts. BEIS will not pay fixed per diems.

## 6.6. Claiming expenses

To be reimbursed, expenses must be incurred during the period of the project and be linked to the approved budget lines and activities of the project. All expenses must be clearly detailed and evidenced, showing the actual cost incurred supported by receipts, tickets, hotel bills etc.

- Every expense claim should include sufficient information to justify each expense and should include what the expense is, the date it was incurred and the reason why. All travel claims must state the journey start and end location.
- Bank or credit/debit card statements alone are not acceptable evidence, though must also be provided if the receipt does not evidence payment.
- The currency in which the expense was incurred should always be detailed. If this is not GBP, evidence should be provided showing the exchange rate to GBP (ideally a bank statement showing the GBP cost debited or details of the exchange rate from [www.xe.com](http://www.xe.com) or [www.oanda.com](http://www.oanda.com)). There are several accepted approaches. So long as used consistently, reporting can use the exchange rate on the date each expense was paid; the date the invoice was submitted; or the monthly average. For advance payments, the rate used can be the date the money was paid from the bank.

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



- Per diem rates will not be reimbursed. However, actual expenditure (evidenced by receipts, invoices etc.) on accommodation, subsistence and travel can be reimbursed.
- Air miles or equivalent reward schemes should not be used to pay for the cost of flights as they will not be reimbursed.

## 7. Indirect costs

Indirect costs are overhead costs that relate to the overall operations, management and identity of the supplier rather than to programme services. These costs are necessary for programmes to function although cannot be clearly linked to specific project outcomes and results (i.e. business expenses not including or related to direct labour, direct materials or third-party expenses that are charged directly to projects).

Typically, they include overall management and employee costs, administration and support, equipment, space and premises costs, and activities that relate to the whole organisation and partly support your project, but also support your other projects. These may include:

### 7.1. Premises and office costs

This category relates to all costs associated with the organisation's premises and office including rent and imputed rent, mortgage costs, depreciation, management of facilities, building insurance, rates, maintenance and cleaning, groundworks and gardening, utilities, catering, vending services and residential accommodation.

### 7.2. Central function costs

This category relates to all costs associated with the organisation's Board of Directors including basic salary, maternity and sick pay, other paid leave (sabbatical, vacation, home leave, and paid holidays) overtime, allowances, payroll taxes, pensions, travel and subsistence and telephone.

It also relates to all salary and on-costs associated with the organisation's central functions including but not limited to human resources, finance, information technology, secretarial, internal audit, policy and research and evidence departments, marketing, office management and any other central support functions, travel and subsistence, bank charges and recruitment costs.

### 7.3. Governance and strategic development costs

This category relates to external expert and professional services expertise brought in when in-house skills are not available, including payments for services contracted to provide strategic or governance direction, financial, management, procurement, legal, audit, human resources or technical advice. This includes any other internal governance

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



and strategic development cost that is not a central function cost or premises and office cost.

#### 7.4. Share of indirect costs

Since different projects make different demands on the organisation it is important to note that indirect costs are not necessarily proportional to the direct costs of a project. Indirect costs should be shared between on a fair and reasonable basis. This means:

- Each programme's share of the indirect cost is appropriate given the nature and extent of its activities (i.e. a programme does not receive a share of overheads that it does not incur).
- There is a rational basis for the method used to share indirect costs that can be justified and supported.
- The allocation of indirect to the programme is only an estimate. The allocation method must be fair and reasonable based on the information you have.

A straight percentage allocation to the budget is not based on an understanding of your organisation's overheads and is therefore unlikely to meet the principles detailed above.

If you intend to raise income for your programme from other sources, we expect those sources to cover their fair share of the programme's indirect costs. BEIS will only fund its share of the programme's overheads. We would not expect to fund a greater share of indirect costs than the share of the programme direct costs we are funding.

#### 7.5. Accounting and budgeting for indirect costs

We anticipate that, in the vast majority of cases, indirect costs will be included in the daily fee rates of staff and a further breakdown is not required at the time of bidding. If indirect costs are not included in daily rates and you need to list them separately, please speak to BEIS.

#### 8. Payment basis and cost verification

BEIS and HMG operate on a policy of operational need. Payments are made in arrears according to BEIS policy rules unless in exceptional circumstances and where otherwise expressly agreed in writing. We expect our partners to follow the same principles downstream.

An assessment of the eligibility of the costs included within your proposal will be conducted prior to the award of any contract or funding agreement.

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial



## Annex F: Supplier day slides and Q&A

**The IEA Secretariat is placing increasing emphasis on cross-TCP collaboration. Does BEIS have plans on how the TCP Alternative Delegates can support this cross-TCP integration?**

Yes, cross-TCP collaboration is part of the remit of the alternate delegates. We are also planning on hosting a workshop at contract start to identify potential collaborations and maximise the potential of our participation in the TCPs

**Where will the tender be published and when will it be published?**

It is planned that the tender will be published on the BEIS Jaggaer portal (<https://beisgroup.ukp.app.jaggaer.com/>) on 11<sup>th</sup> August 2022.

**I have been a sub-task group leader in an annex and involved in further annexes, does this help with the application?**

Yes, relevant knowledge, experience and contacts, in the TCPs or otherwise, will certainly be useful in your application.

**You have mentioned that "additional budget may be made available for participating in annexes based on day rate provided in bid." Will this be for the AD to estimate the number of days required for an activity, for example leading an Annex, or is there already a number of days defined for this? Will this budget just be available for the AD or also potentially for the National Team?**

There is a fixed maximum budget of £18,500, including the minimum requirement (general tasks), budget for participating in annexes and chairing the TCPs. The Programme of Work will vary by TCP, and be defined at the start of each year with the BEIS delegate (October of each year). The Programme of Work will then be reviewed by the BEIS TCP Coordinator, who will be overseeing the 10 contracts. The funding may be potentially used for activities pertaining to the National Team, although there is flexibility to also use the minimum requirement budget for this.

**There is a cap of £5600 for the remainder of this FY. I assume this is just for the core AD tasks and not for participating other Annex activities?**

The annual maximum budget available is £18,500 for a full year. Therefore the maximum budget available for the first financial year (October 2022-March 2023) will be pro-rata. The minimum time requirement in a year for the core AD tasks (participating in executive committee meetings and associated tasks, and leading and developing a national team) is 11 days per year. Therefore the minimum time requirement for the first financial year (October 2022-March 2023) is 7 days. The minimum requirement does cover some annex activities, especially those where the UK is not the "operating agent" (annex group leader). This might

Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPs				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial





involve attending ad-hoc workshops or submitting information in a fact sheet. The alternate delegate will discuss at the beginning of the year with the BEIS delegate the scope of work, which is likely to be greater than the minimum requirement.

**Is it possible to apply for more than one lot? I also have experience relevant to other groups.**

It is not possible for an individual to apply for more than one lot. This is because the Executive Committee meetings are likely to be at the same time. However, it is possible to participate in the National Teams of different TCPs and use cross-cutting experience to foster cross-TCP collaboration. However, an organisation can apply for several TCPs, if it is on behalf of different applicants for each TCP.

**Hydrogen: is the work skewed towards blue hydrogen and CCS?**

The Hydrogen TCP is colour-agnostic. The historic, current and future work plan can be found at <https://www.ieahydrogen.org/>.

**How long do you plan for this contract to last (from Oct22 onwards)?**

The contract is from Oct 22 to 31<sup>st</sup> March 2025.

**Can I apply as a sole trader?**

Yes. Individuals cannot apply directly but must apply through an organisation (which can be a sole trader, academia, industry, professional or trade bodies).

**The date of submission for the opportunity is during the week of the August bank holiday which is very likely to coincide with various leave commitments. Would an extra week be considered to accommodate this please?**

The submission date has been moved from 31<sup>st</sup> August to 1<sup>st</sup> September 2022 to allow an extra day after the bank holiday weekend. Unfortunately, we cannot move the submission any later as we are keen to start the contracts week commencing 7<sup>th</sup> October so that the new alternate delegates can attend the Executive Committee meetings which take place October-November, and the dates have already been set.

**Link to the slide pack:** [IEA TCP Supplier day slides](#)

**Link to the recording:** [Recording of supplier day on 20/07/2022](#)

Note the slide pack has been edited since the Supplier Day to be consistent with the information provided in this invitation to tender. Note therefore that some information in the recording is out of date, and please refer to the information written in the tender if there is any conflicting information.

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Classification:	OFFICIAL				
Document Title:	ITT Pack for Alternate delegates for ten IEA TCPS				
Version:	0.1	Version Date:	11 <sup>th</sup> August 2022	Owner:	BEIS Commercial