



Ministry
of Defence

Defence Infrastructure Organisation



Please see attached tender list.

Your Reference:

Our Reference: 700003955

Date: 7 October 2019

Dear Sir / Madam,

Invitation To Tender Reference Number: 700003955 – Future Defence Infrastructure Services (FDIS) Programme Hard FM / Built Estate.

1. You are invited to tender for the above reference requirement in accordance with the attached documentation.
2. The anticipated date for the contract award is 3 November 2020, please note that this is an indicative date and may change.
3. You must submit your Tender no later than 2 March 2020. You must attach the enclosed Tender Return Label (DEFFORM 28) to the outer packaging of your Tender when you submit it to the Buyer.
4. Please confirm receipt of this tender to me via the following e-mail address:


Yours faithfully,



Head of Commercial, FDIS Programme

For and on behalf of DIO

List of Tenderers Invited to Submit a Tender for ITT 700003955.

Tenderer	Point of Contact	Email
Amey Community Limited	[REDACTED]	[REDACTED]
Graham Asset Management	[REDACTED]	[REDACTED]
Kellogg Brown & Root Ltd	[REDACTED]	[REDACTED]
Mitie Limited	[REDACTED]	[REDACTED]
Vivo Defence Services Limited (ENGIE-Serco)	[REDACTED]	[REDACTED]
VINCI Construction UK Ltd, trading as VINCI Facilities	[REDACTED]	[REDACTED]
Reserve List		
Ecolog International FZE	[REDACTED]	[REDACTED]
Interserve (Defence) Ltd	[REDACTED]	[REDACTED]
Wates Property Services	[REDACTED]	[REDACTED]
Volkerstevin Ltd (Volker Turner)	[REDACTED]	[REDACTED]



FUTURE DEFENCE INFRASTRUCTURE SERVICES

TENDER REQUIREMENTS FOR LOT 3 - HARD FACILITIES MANAGEMENT (FM) / BUILT ESTATE

7 October 2019



1. INVITATION TO TENDER

- 1.1. This Invitation to Tender (ITT) relates to the Future Defence Infrastructure Services (FDIS) Hard Facilities Management (HFM) Defence Built Estate regional contracts for the following 4 regions: South East, South West, Central, and Scotland and Northern Ireland.

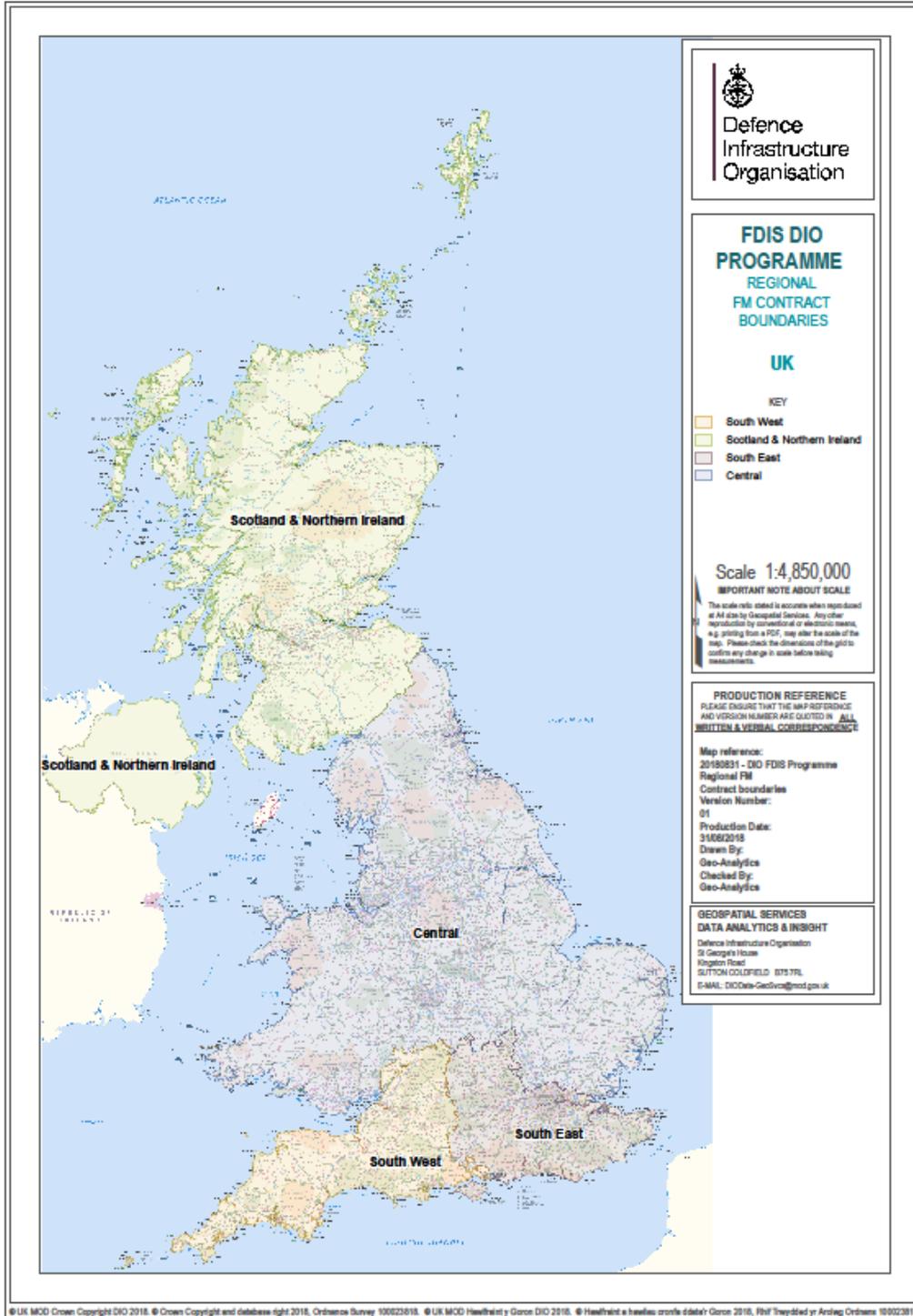


Figure 1: Map of FDIS Regions



- 1.2. This ITT provides information on key aspects of the Project and the way in which the procurement process will operate.
- 1.3. This ITT is made available on condition that it is used in connection with this procurement process and for no other purpose. The attention of Tenderers is drawn to Additional Tender Requirements Part 1, General Notices and in particular, the confidentiality requirements set out at paragraph 10.

2. INTERPRETATION

- 2.1. In the event of any inconsistency between the provisions of this ITT and any previously issued information, the provisions of this ITT shall prevail. Save to the extent expressly referenced herein, the ITT supersedes all previous documents and information that has been issued to Tenderers.

3. TENDER DOCUMENTATION

- 3.1. The documentation listed in Table 1 together comprises the tender documentation for the FDIS HFM Built Estate regional contracts.
- 3.2. During the tender process individual Schedules or documents may be revised, withdrawn or added to by issuing an amendment to the ITT.

Document	Title
The Additional Tender Requirements are divided into Parts and Appendices as follows:	
Part 1	General Notices
Part 2	Future Defence Infrastructure Services Requirements
Part 3	Procedure Process
Part 4	Tender Evaluation
Annex A	Tender Submission Document (Offer)
Annex B	MOD Site Visit Protocol for Tenderers
Annex C	Certificate of Compliance – Identical Tender
Annex D	Evaluation Worked Examples
Annex E	Insurance Evaluation
Annex F	Technical Evaluation Questions
Annex G	Virtual Data Room Contents List
Annex H	TUPE Data
Annex I	DEFFORM 28 – Tender Return Label

Table 1: Table of Contents

- 3.4 Tenderers are requested to check that all documentation listed has been received. If a Tenderer believes the listed documentation has not been provided, or extracts are missing, this should be notified to the Buyer's Point of Contact found at paragraph 8.4.



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FDIS ADDITIONAL TENDER REQUIREMENTS

PART 1

GENERAL NOTICES



4. FM FRAMEWORK SERVICES – LOT 3 DEFENCE FACILITIES MANAGEMENT

- 4.1. The Buyer is issuing this ITT to all Ten (10) Tenderers identified on the CCS Framework RM6089 Workplace Services (FM Marketplace Phase 2) Lot 3 – Hard Facilities Management (HFM), to participate in the procurement process for the purposes of supplying Future Defence Infrastructure Services (FDIS) HFM Built Estate regional contracts.

5. PURPOSE OF THE ADDITIONAL TENDER REQUIREMENTS

- 5.1. The Additional Tender Requirements provide guidance and instructions on the Tender requirement and topics considered important by the Buyer to assist in the production of a Tender response. Consequently, it is essential that they are read and understood by all members of the Tenderer's team.
- 5.2. Tenderers should note that all documentation issued in this ITT is Crown Copyright and may only be copied and used for the purpose of preparing a response to the requirement. All documentation issued is to be returned to the Buyer at the address in paragraph 8.4 either immediately after Contract award, or immediately in the case of any Tenderer who declines to bid.

6. PROCUREMENT ADMINISTRATION - AWARD SOFTWARE

- 6.1. The Buyer has engaged Commerce Decisions Limited to use the AWARD Software to support the ITT process. AWARD is available as an internet-based portal, providing Tenderers access controlled via login and permissions. The following will be hosted and managed on AWARD for this procurement:
- 6.1.1. Communication
 - 6.1.2. Tender Documentation availability;
 - 6.1.3. Tenderer Clarification Question Process (including any Requests for Information);
 - 6.1.4. Electronic submission of Tender submission;
 - 6.1.5. Buyer's evaluation of Tender submission.
- 6.2. AWARD Software operating instructions are available on AWARD once login and permissions are issued. Tenderers should familiarise themselves with the operating instructions once access has been granted. Use of and access to the software will be monitored to ensure the Tenderers are carrying out their responsibilities correctly.

7. VIRTUAL DATA ROOM (VDR)

- 7.1. The virtual data room contains a suite of documentation and asset data which relates to this procurement. An index of this is at Annex G.
- 7.2. This will be made available to suitably cleared members of the Tenderer team through secure IT equipment. The Tenderer is required to keep all such documents on the MOD systems and to use the secure access only in direct support of this tender. Any violation of the Security Operating Procedures will result in the Tenderer being removed from the competition and may lead to further action under the Official Secrets Act.



8. ADMINISTRATIVE COMMUNICATIONS

- 8.1. Tenderers must each appoint one point of contact who will be responsible for all administrative communications with the Buyer, and to whom the Buyer should address any such enquiries during this procurement process. The name, address, telephone number and email address of the Tenderer's contact must be notified to the Buyer's point of contact at the email address given at paragraph 8.4 below as soon as possible, but no later than five (5) working days from the date of issue of the ITT. Any subsequent changes to the Tenderer's contact details are to be notified to the Buyer as soon as reasonably practicable.
- 8.2. Tenderers should familiarise themselves with the notices and instructions herein and within AWARD Software relating to communications relating to the clarification question process and processes for receipt of tenders.
- 8.3. The Table below details the various administrative communications and the channel to be used to communicate with the Buyer.

Type of Communication	Route for Communication
Non-receipt of complete Tender documentation	AWARD
Point of Contact Notification – within five (5) days of issue of ITT	Buyer's email
No access/issues with access to AWARD and documentation	AWARD Helpdesk
Receipt of amendments to ITT – within five (5) working days	Buyer's email
Tenderer requires written permission from Buyer for disclosure / distribution of confidential information	Buyer's email
Withdrawal from Tender	Buyer's email
Activities relating to Behavioural Collaborative Assessment	Buyer's email
Request for extension – no later than twenty-eight (28) working days before tender return date	Buyer's email
Clarification Questions	AWARD

Table 2: Communication throughout the tender process

- 8.4. All other administration should be directed to the Buyer's point of contact as detailed below:

Buyer's Point of Contact: [REDACTED]

Buyer's Email: [REDACTED]

Telephone: [REDACTED]

Address: [REDACTED]

- 8.5. The Buyer will notify Tenderers of any changes to the contact details listed in paragraph 8.4.



9. AMENDMENTS

- 9.1. Tenderers are required to acknowledge receipt of any amendments to the ITT documentation within five (5) working days of the date of the issue of the amendment, this should be via email to the Buyer's Point of Contact in paragraph 8.4.

10. CONFIDENTIALITY

- 10.1. Subject to paragraph 11.2 below, the information in this ITT is made available to Tenderers on condition that Tenderers:

- 10.1.1. shall at all times treat the information in confidence;
- 10.1.2. shall not disclose, copy, reproduce, distribute or pass the Information to any other person at any time or allow any of these things to happen;
- 10.1.3. shall not use the Information for any purpose other than the purpose of preparing for, engaging in negotiation and making (or deciding whether to make) a Tender during this procurement process;
- 10.1.4. shall procure that each of the members of its tender preparation team who receives any of the information is made aware of, and complies with the provisions of, this paragraph 11 as if it were a Tenderer and
- 10.1.5. shall protect personally identifiable information in accordance with all relevant legal obligations, including those under the GDPR.

- 10.2. Any Tenderer who, in the Buyer's opinion breaches any of the requirements of paragraph 10 may at the Buyer's sole discretion be disqualified from taking any further part in this procurement process (without prejudice to any other civil remedies available to the Buyer).

- 10.3. Tenderers may disclose, distribute or pass the information to another person if either:

- 10.3.1. this is done for the sole purpose of enabling a Tender to be submitted and the person receiving the Information undertakes in writing to keep the information confidential on the same terms as set out in these General Notices; or
- 10.3.2. the Tenderer obtains the prior written consent of the Buyer in relation to such disclosure, distribution or passing of information.

11. PROTECTION OF INFORMATION

- 11.1. Tenderers should note that the National Audit Office (NAO) has a legal right to see any information which is held by the Buyer for the purpose of audit or review.

- 11.2. All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all



expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement – including ensuring value for money and related aspects of good procurement practice. For these purposes, the Buyer may disclose within Government any of the Tenderers’ documentation/information (including any that a Tenderer considers to be confidential and/or commercially sensitive) submitted by the Tenderer to the Buyer during this Procurement. The information will not be disclosed outside Government. Tenderers taking part in this competition consent to these terms as part of the competition process.

12. EXTERNAL ADVISORS

12.1. The Buyer is supported by external service providers. These companies are regarded as integral parts of the project team and will therefore have access to a variety of both internal data and Tenderer information. The advisors currently appointed are:

Advisors	Responsibilities
Burges Salmon LLP	Legal
Commerce Decision Ltd	AWARD Software
Ebeni Ltd	Collaboration Analysis
PA Consulting Services Ltd	Commercial Delivery Partner
PWC Advisory Services Ltd	FDIS PMO
Willis Towers Watson Insurances (Ireland) Ltd	Insurance Advisers
WT Partnership Ltd	Hard FM Specialist

Table 3: List of external advisors

12.2. The Buyer reserves the right to engage from time to time with other external advisors as it considers necessary.

13. ACCURACY OF INFORMATION AND LIABILITY OF THE BUYER AND ITS ADVISERS

13.1. The information set out in this ITT and any other documents or information to which it refers has been prepared by the Buyer in good faith. However, it does not purport to be comprehensive or to have been independently verified and the Buyer does not accept any responsibility for the information set out in this ITT or in any other document for its accuracy or completeness and shall not be liable for any loss or damage arising as a result of such information or any subsequent communication.

13.2. Tenderers are expected to carry out their own due diligence checks for verification purposes subject to the confidentiality requirements as at paragraph 10. Tenderers considering entering into a contractual relationship with the Buyer should make their own investigations and enquiries as to the Buyers requirements beforehand. The subject matter of this ITT will have contractual effect only when it is incorporated into the express terms of an executed Contract.

13.3. The issue of this ITT should not to be construed as a commitment by the Buyer to enter into a Contract as a result of this procurement process. Any expenditure, work or effort undertaken prior to the execution of any Contract is accordingly a matter solely for the commercial judgement of the Tenderer. The Buyer reserves the right to withdraw from the Project at any time, or to re-invite Tenders on the



same or any alternative basis or not award any Contract as a result of the competitive procurement process and/or reject any Tender.

13.4. This ITT should not be considered as an investment recommendation made by the Buyer to any Tenderer taking part in this Tender process. Each Tenderer must make its own independent assessment after making such investigation and taking such professional advice as is deemed necessary. None of the Buyers Ministers, servants, agents or advisors make any representations or warranties (express or implied) or accept any liability or responsibility (other than in respect of fraudulent misrepresentation) in relation to the adequacy, accuracy, reasonableness or completeness of the Information or any part of it (including but not limited to, any loss or damage arising as a result of reliance by the Tenderer on the information or any part of it).

13.5. Each Tenderer shall be responsible for the accuracy of all information submitted within its Tender.

13.6. As set out in the draft contract, there will be a 12-month period allowed following the In-Service Date for final verification of actual asset condition and correction of the bidding assumptions which underpin the Tenderer's prices.

14. BUYER'S RIGHT TO REJECT

14.1. The Buyer reserves the right, at its absolute discretion, to disqualify any Tenderer that does not in the Buyer's opinion comply with the requirements of this ITT or any other requirement of the Buyer in connection with this procurement process that may from time to time be notified to the Tenderer.

14.2. The Buyer reserves the right to disqualify any Tenderer that is guilty of serious misrepresentation in relation to its Tender submission.

15. CANVASSING

15.1. Any Tenderer who, in connection with this Project:

15.1.1. Offers any inducement, fee or reward to any Minister, Servant or Agent of the Buyer or any person acting as an adviser to the Buyer in connection with this negotiation process or does anything which would constitute a breach of the Prevention of Corruption Act 1889 to 1916; or Bribery Act 2010; or

15.1.2. Contacts any Minister, Servant or Agent of the Buyer or any person acting as an adviser to Buyer prior to a Contract being entered into about any aspect of this process in a manner not permitted by this ITT may be disqualified at the Buyers absolute discretion (in either case without prejudice to any other civil remedies available to the Buyer and without prejudice to any criminal liability which such conduct by a Tenderer or Consortium Party may attract).



16. BID RIGGING & OTHER ILLEGAL PRACTICES

16.1. Tenderers must report any bid rigging, fraud, bribery, corruption, or any other dishonest irregularity in connection to this tendering exercise to Defence Regulatory Reporting Cell Hotline 0800 161 3665 (UK) or +44 1371 85 4881 (Overseas)

17. PUBLICITY ANNOUNCEMENT

17.1. The Buyer will publish notification of the contract and shall publish contract documents under the FOI Act except where publishing such information would hinder law enforcement; would otherwise be contrary to the public interest; would prejudice the legitimate commercial interest of any person or might prejudice fair competition between suppliers. Tenderers should complete and return Joint Schedule 4 Commercially Sensitive Information.

17.2. If Tenderers wish to make a similar announcement, Tenderers must seek approval from the named Commercial Officer, under paragraph 8.4.

17.3. Under no circumstances should Tenderers confirm to any Third Party the Buyer's acceptance of an offer of contract prior to either informing the Buyer of acceptance or the Buyer's announcement of the award of contract, whichever occurs first.

18. CONFLICTS OF INTEREST

18.1. For the purposes of this ITT, the term "Conflict of Interest (COI)" includes the circumstances set out in Reg. 24(2) PCR 2015.

18.2. Tenderers must notify the Buyer immediately of any COI that has arisen or is likely to arise at any point prior to contract award decision.

18.3. Where there is an existing or potential COI Tenderers must include a proposed Compliance Regime in the Tender. As a minimum this must include:

- a. manner of operation and management;
- b. roles and responsibilities;
- c. standards for integrity and fair dealing;
- d. levels of access to and protection of competitors sensitive information and Government
Furnished Information;
- e. confidentiality / non-disclosure agreements
- f. the Buyer's rights of audit; and
- g. physical and managerial separation.

18.4. The Buyer will review any proposed Compliance Regime and consider whether such a regime is sufficient to avoid any distortion of competition and to ensure equal treatment of all Tenderers.

18.5. Should the Buyer consider that the proposed Compliance Regime is acceptable, the proposed Compliance Regime will become part of the Contract and shall be legally binding.

18.6. Should the Buyer consider that the proposed Compliance Regime is not acceptable, the Tenderer will be excluded from the procurement process.



SECURITY

18.7. This Invitation to Tender contains documents that are OFFICIAL and OFFICIAL SENSITIVE. It is anticipated that the highest classification of documents to be made available during the procurement will be classified OFFICIAL SENSITIVE.

18.8. Tenderers are required to ensure that any OFFICIAL documents are not transmitted via unsecure facsimile or via the internet either in the UK or overseas. Official material may be sent via postal system in a sealed envelope, but such documents to be sent overseas must be double enveloped. The inner envelope should show the address, name and appointment of the addressee and be marked OFFICIAL, boldly in red. No protective marking should appear on the outside envelope which should be addressed as usual.

18.9. All Tenderers including sub-contractors within the Defence Supply chain, must follow the Defence Cyber Protection Partnership (DCPP) Cyber Security Model for any contract that involves the transfer of MOD Identifiable Information.

18.10. All Tenderers must have the appropriate security controls in place by contract start date to manage the allocated cyber risk level or have agreed a Cyber Implementation Plan. A Security Aspects Letter will be issued to all Tenderers with the ITT to cover the controls required during the tendering process and will be re-issued to the successful Tenderer at the Contract start date.

18.11. The below links will take Tenderers to the relevant documentation:

- DEFSTAN 05-138 Issue 2 Cyber Security for Defence Suppliers
- Defence Cyber Protection Partnership Cyber Security Model Industry Buyer and Supplier Guide - Jun 18
- Industry Security Notice 2017/03 - Reporting of Security Incidents
- Industry Security Notice 2017/04 - Industry Supplier Guidance on DEFCON 658 (Cyber)

19. TENDER EXPENSES

19.1. The Tenderers will bear all costs associated with preparing and submitting the Tender. If the Tender process is terminated or amended by the Buyer, the Buyer will not reimburse the Tenderer.

20. INNOVATIVE / VARIANT BIDS

20.1. Innovative and / or variant bids will not be accepted.



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FDIS TENDER REQUIREMENTS

PART 2

FUTURE DEFENCE INFRASTRUCTURE SERVICES HARD FACILITIES MANAGEMENT REQUIREMENTS



21. PROJECT AIMS

- 21.1. The Future Defence Infrastructure Services (FDIS) contracts will provide Hard FM Services across the UK Defence estate, replacing existing arrangements when they come to an end. Each contract will be seven years in length, with a review at Year 3, and with options to extend beyond the initial term up to a further three years, subject to satisfactory performance and other considerations.
- 21.2. The FDIS programme will procure new Hard FM arrangements for four Regional contracts – South West, South East, Central and Scotland & Northern Ireland.
- 21.3. FDIS will cover all sites and establishments on the UK Defence estate, except those with long term contracts already in place (e.g. [REDACTED]).
- 21.4. There are win restrictions in place across the Regions, with any Tenderer not able to win more than 2 Regional Contracts. This is explained further in paragraph 39. At Contract Award the Built Estate will have a minimum of 2 Suppliers delivering Hard FM across the 4 Regions.

22. CONTRACT DOCUMENTS

- 22.1. The contract documents will contain the following:

- Framework Schedule 6 Order Form
- Core Terms
- Joint Schedule 1 – Definitions
- Joint Schedule 2 – Variation Form
- Joint Schedule 4 – Commercially Sensitive Information
- Joint Schedule 5 – Corporate Social Responsibility
- Joint Schedule 6 – Subcontracting & Key Subcontractors
- Joint Schedule 7 – Financial Distress
- Joint Schedule 8 – Guarantee
- Joint Schedule 9 – Minimum Standards of Reliability
- Joint Schedule 10 – Rectification Plan
- Joint Schedule 11 – Processing Data
- Joint Schedule 12 – Supply Chain Visibility
- Call-Off Schedule 1 – Transparency Reports
- Call-Off Schedule 2 – Staff Transfer
- Call-Off Schedule 3 – Continuous Improvement
- Call-Off Schedule 4 – Facilities Management
- Call-Off Schedule 4A – Billable Works and Projects
- Call-Off Schedule 5 – Pricing
- Call-Off Schedule 6B – TUPE Price Adjustment
- Call-Off Schedule 7 – Subcontracting & Key Subcontractors
- Call-Off Schedule 8 – Business Continuity and Disaster Recovery
- Call-Off Schedule 9 – Security
- Call-Off Schedule 10 – Exit Management
- Call-Off Schedule 11 – Insurance Requirements
- Call-Off Schedule 12 – ICT Services Terms
- Call-Off Schedule 13 – Mobilisation
- Call-Off Schedule 14 – Performance Management



Call-Off Schedule 15 – Contract Management
Call-Off Schedule 16 – Benchmarking
Call-Off Schedule 17 – MOD Terms
Call-Off Schedule 18 – Concession Agreement
Call-Off Schedule 19 – Collateral Warranty Agreement
Call-Off Schedule 20 – Clustering
Call-Off Schedule 21 – Performance Bond
Call-Off Schedule 22 – Call-Off Tender
Call-Off Schedule 24 – Collaboration
Call-Off Schedule 25 – Relevant Conviction
Call-Off Schedule 26 – Scottish Law
Call-Off Schedule 27 – Northern Ireland Law
Call-Off Schedule 28 – Call-Off Specification
Call-Off Schedule 29 – Rates and Prices
Call-Off Schedule 30 – Health and Safety
Call-Off Schedule 31 – Contractor Premises
Call-Off Schedule 32 – Risk Management

23. SCOPE OF SERVICES

- 23.1. The Call-Off Schedule 28 (Specification) provides detailed specification of the services required under the Hard FM Built Estate Contracts, including regional variations and specific requirements for certain Establishments.
- 23.2. The Establishments in scope for this Programme are detailed in Call-Off Schedule 29 (Rates and Prices).
- 23.3. Additional information regarding each Establishment can be found in the Virtual Data Room.

24. MOBILISATION

- 24.1. The Tenderer will provide a draft Mobilisation Plan and Test Strategy as part of the bid response. This will be agreed with the Buyer and form an Annex to Call-Off Schedule 13 (Mobilisation).
- 24.2. The Test Strategy will be used to verify and drive acceptance of the Deliverables and Milestone Payments during mobilisation, as set out in Call-Off Schedule 13 (Mobilisation).

25. PERFORMANCE MANAGEMENT REGIME

25.1. The Buyer has identified seven (7) Performance Measure Categories each of which contains a suite of Performance Measures. The Performance Measure Categories are:

- a) Compliance and Safety
- b) Service Delivery
- c) Management Information
- d) Sustainability
- e) Customer Satisfaction
- f) Collaboration and Continuous Improvement



g) Management of Change

- 25.2. The successful Tenderer's performance of the Services will be measured under a Performance Management Regime by applying the Performance Measures as set out in the Contract to various parts of the service, details of which can be found in Call-Off Schedule 14 (Performance Management).
- 25.3. Supplier performance in respect of changes to the Contract Term and sourcing decisions for Billable Works will be assessed against a Balanced Scorecard comprising a range of Key Themes against which critical success factors will be measured, details of which can be found in Call-Off Schedule 14 (Performance Management).
- 25.4. Profit figures were declared at Framework and set a not-to-exceed figure which shall be carried through into the Call-Off Tender. The Tenderer may suggest a lower figure in its tender that shall be entered the Order Form. The Supplier's Profit will be adjusted according to the Performance Management Mechanism as detailed in Call-Off Schedule 14 (Performance Management) and will be paid in accordance with Call-Off Schedule 5 (Call-Off Pricing).

26. SUSTAINABLE PROCUREMENT

- 26.1. The Buyer is committed to achieving sustainable development goals through educating the supply chain, developing performance measures and sharing best practice. This is not a condition to working with the Buyer now or in the future, nor part of the Contract. It is, however, a commitment on the part of the Buyer to encourage and support sustainable development.

27. TUPE

Applicability of TUPE

- 27.1. Tenderers' attention is drawn to the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE), as amended and /or the Service Provision Change (Protection of Employment) Regulations (Northern Ireland) 2006, as amended from time to time. The Buyer would be neither transferor nor transferee of the employees in the circumstances of any contract awarded as a result of this invitation and it is the Tenderers responsibility to consider whether or not TUPE applies to this re-let and to tender accordingly. Notwithstanding this, Tenderers will wish to note that it is the Buyer's view that TUPE is likely to be applicable if this ITT results in a Contract being placed, although the Buyer shall not be liable for the opinion expressed above. In these circumstances the Buyer will wish to satisfy itself that its proposals are responsibly based and take full account of the likely TUPE obligations.

TUPE Information Provided for Tendering Purposes

- 27.2. TUPE information in respect of the current employees is provided at Annex H. This information may be updated prior during the tender process, in which event the Buyer will provide instructions as to what (if any) revisions to the Tender documentation are required.



- 27.3. The accuracy and completeness of this information cannot be warranted by the Buyer. It remains the Tenderer's responsibility to ensure that its Tender(s) take(s) full account of all the relevant circumstances of this contract re-let and tender accordingly.
- 27.4. Tenderers should ensure that they read and fully understand the obligations in Call-Off Schedule 2 – Staff Transfer as part of their response to the Commercial Compliance Criteria.
- 27.5. **Pensions** – Tenderers should be of the requirements of the Treasury's Guidance contained in 'Fair Deal for staff pensions: staff transfer from central government (October 2013).
- 27.6. The aims of the arrangements described in the document are that:
- 27.6.1. Staff who are members of a public service pension scheme, and who are compulsorily transferred out of the public sector should continue to be members of the public service pension scheme they were in immediately prior to the transfer, while they continue to be employed on the contracted services, subject to the eligibility criteria of the relevant scheme.
 - 27.6.2. Staff previously compulsorily transferred from the public sector under old Fair Deal and meet the eligibility requirements for new Fair Deal should be provided with access to the appropriate public service pension scheme, while they continue to be employed on the contracted services.
 - 27.6.3. Contractors and Sub-contractors who become employers of staff who are currently members of, or are eligible to be re-admitted to, the Civil Service Pension Schemes (PCSPS/alpha) will be required to enter into an Admission Agreement with the Cabinet Office and the Buyer.
 - 27.6.4. A copy of 'Fair Deal for staff pensions: staff transfer from central government (October 2013), and the tri-partite Admission Agreement and associated guidance is available from:

<http://www.civilservicepensionscheme.org.uk/employers/applying-to-join-civil-service-pensions/new-fair-deal/>



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TENDER REQUIREMENTS

PART 3

THE INVITATION TO TENDER PROCESS



28. THE PROCUREMENT PROCESS

28.1. The following section outlines the key stages in this procurement process and where these processes are conducted using the AWARD Software.

29. CALL-OFF TENDER PROCESS & TENDER LIST

29.1. The FDIS Hard FM Built Estate Contracts will be competed under CCS Framework RM6089 Workplace Services II Lot 3, Defence Facilities Management.

29.2. The Further Competition Procedure will be instigated in accordance with Framework Schedule 7, Paragraph 2.

29.3. The Buyer will be utilising Framework Schedule 7, Paragraph 2.1.4 (c). The Further Competition will initially only invite the six primary Framework Suppliers to tender for the FDIS contracts.

29.4. The Buyer will issue a single ITT to cover the four regional contracts.

29.5. Tenderers must submit a separate Tender response for each regional contract tendered for.

29.6. Framework suppliers will be invited to bid for all four FDIS Hard FM Built Estate regional contracts.

29.7. All Tenderers will be requested to indicate their intention to tender and the regions which they intend to bid for in writing to the Buyer's email address within 5 working days of ITT issue.

29.8. The Framework Defence Lot Reserve List was developed to ensure sufficient regional coverage for the Defence Estate. If fewer than three primary suppliers indicate that they intend to bid for an individual region pursuant to paragraph 28.7 above, the Buyer will invite all CCS Framework Lot 3 reserve list suppliers to compete for that region(s), in accordance with Framework Schedule 7, 2.1.3 Part D.

30. FORMAT OF TENDER ISSUE

30.1. Tenderers will access the ITT documentation via AWARD.



31. TIMETABLE

An indicative timetable for the key stages of the procurement process is shown below in Table 4.

Serial	Event	Date
1	Issue of ITT	07/10/19
2	Tenderer Clarification Questions commence	08/10/19
4	MOD Site Visits	03/09/19 – 22/11/19
5	Board Interviews	09/12/19 – 20/12/19
6	Tenderer Site Visits	09/12/19 – 20/12/19
7	Collaboration Team Assessment Workshops	13/01/20 – 15/02/20
8	Tenderer Clarification Questions Closure	27/11/19
9	Buyer Clarification Responses Complete	04/12/19
10	Final Date for Requests for Extension to Return Date	28/01/20
11	Tender Return Date	02/03/20
12	Final Tender – Tender Board	03/03/20
13	Tender Submission Evaluation commence	04/03/20
14	Internal Approvals	11/03/20 – 28/10/20
15	Standstill Period commence	30/10/20
16	Contract Award	03/11/20
17	In Service Date Scotland & Northern Ireland	21/05/21
18	In Service Date Central	17/08/21
19	In Service Date South East	18/11/21
20	In Service Date South West	07/03/22

Table 4: Timetable for Tender process

32. CHANGES TO THE PROCUREMENT PROCESS

32.1. All dates in the above timetable from event number 12 are **provisional only** and the Buyer may vary any date within the timetable or terminate the procurement process in any way at its sole discretion.

32.2. The Buyer reserves the right, without giving prior notice, to:

- 32.2.1. waive or change the requirements of this ITT in whole or in part from time to time; and
- 32.2.2. make whatever changes it sees fit to the structure or content of the procurement process, including by adding a further iterative tendering process following receipt of Final Tenders.

33. CLARIFICATION PROCESS

33.1. All Tenderer clarifications must be submitted via AWARD.

33.2. Any clarifications received after the closure date in Table 4 will not be actioned or acknowledged.



33.3. The Buyer aims to respond to all clarification questions within five (5) working days of receipt.

33.4. Tenderers are requested to clearly identify any clarifications or parts of clarifications which they consider are confidential, stating the reasons why. The Buyer will decide, at its sole discretion, whether or not it accepts the Tenderers reasons. If the Buyer does not accept the reasons for confidentiality, the Tenderer will be notified via AWARD and invited to resubmit the question using the normal clarification process.

33.5. The Buyer will respond to each clarification question individually via AWARD. The responses will come in the form of a Notification to all Tenderers.

33.6. The Buyer will respond to all confidential clarification questions via AWARD addressing only the Tenderer who submitted the question. This will come in the form of a Clarification response.

34. MOD SITE VISITS

34.1. A programme of visits has been arranged for Tenderers, details can be found within the Supplier Engagement Plan.

34.2. Tenderers should ensure all representatives attending a visit comply with the MOD Site Visit protocol for Tenderers, which can be found at Annex B.

35. TENDER SUBMISSION

35.1. The Tender shall be submitted via AWARD including the Executive Summary.

35.2. Tenderers must also submit one (1) hard copy of the technical and one (1) hard copy of the priced Tender as per information contained in Annex I DEFFORM 28.

35.3. In the event of a discrepancy between the hard and electronic copies, the hard copy will take precedence.

35.4. Electronic copies of the Tenders must be compatible with Microsoft Office Word 2016 and other MS Office 2016 applications.

35.5. Tenderers shall not password protect any information in the Tenders.

36. TENDER VALIDITY

36.1. Tenders must be valid/open for Eighteen (18) months from the Tender return date.

37. TENDER BOARD

37.1. MOD policy requires all Tender submissions to be processed through a Tender Board, a solely electronic return is not permitted.

37.2. Tenderers are required to submit their hard copy Tender in a sealed package(s) to the address shown below bearing the label (DEFFORM 28) Annex I.



- 37.3. The outer package must clearly distinguish between Commercial priced, and Technical non-priced submissions.
- 37.4. For health and safety reasons, no individual package should weigh more than 11 kilos. Postal, courier or hand delivery are permitted as acceptable methods of delivery of tenders between hours detailed below. Tenders will not be opened until the time, date and place printed on the label and will be opened by a duly constituted Tender Board with no persons other than the Tender Board present.
- 37.5. Tenders that are hand delivered or couriered to [REDACTED], should in the first instance report to the [REDACTED]. As this is a secure site proof of ID will be required. The Gatehouse will notify Commercial to enable them to collect Tenders and deliver them to the Tender Board Secretary to record and secure them.
- 37.6. Whilst the [REDACTED], the personnel working in the Gatehouse are not allowed to sign for any packages left with them. Therefore, if a Tenderer requires a signature for documentation the Tenderer will need to ensure that it is delivered between [REDACTED] to take receipt and sign for the package.
- 37.7. The Buyer cannot undertake to consider any tender submitted in a different manner (e.g. by telephone, facsimile, email) or any tender not received on time.
- 37.8. Tender submissions will be evaluated to ensure Commercial Compliance in accordance with Part 4 Tender Evaluation Table 6.
- 37.9. If a Tenderer is deemed non-compliant with the requirements of this ITT, the Buyer reserves the right to disqualify the Tenderer from participating in the next stages of the procurement process.



Defence
Infrastructure
Organisation

TENDER REQUIREMENTS

PART 4

TENDER EVALUATION



38. TENDER EVALUATION

38.1. In accordance with Framework Schedule 7 (Call-Off Procedure and Award Criteria), each FDIS Hard FM Built Estate regional contract will be awarded based on a Most Economically Advantageous Tender (MEAT) basis.

38.2. The criteria to be used to evaluate the MEAT will be:

38.2.1. **Quality:** evaluated by reference to:

38.2.1.1. *Commercial compliance (Pass/Fail)* – the elements and approach to the technical evaluation are provided in paragraph 41.

38.2.1.2. *Technical (75%)* – the elements and approach to the technical evaluation are provided in paragraph 49.

38.2.1.3. *Collaborative Behaviour (25%)* – the elements and approach to the collaboration evaluation are provided in paragraph 53.

38.2.2. **Price:** evaluated by reference to Pricing Instructions provided in Call-Off Schedule 29 Rates & Prices. All Tendered prices will be converted as per Paragraph 62 Net Present Value prior to being subject to the evaluation methodology set out in Paragraph 38.3.

38.3. The overall MEAT score will be calculated using the ‘Real Value for Money’ (RVFM) evaluation methodology as follows:

$$\text{MEAT score} = \text{Total Price (£)} - (\text{COPIS} \times \text{Quality score})$$

38.4. Each FDIS Built Estate regional contract has a unique COPIS (‘Cost of One Percent Increase in Score’) which has been pre-defined by the Buyer and is unique to the FDIS Built Estate procurement. The COPIS represents the Buyer’s view of what it requires as an acceptable increase in cost to provide an enhanced technical solution represented by a one-point increase in a Tenderer’s Quality Score. The Buyer’s pre-defined COPIS figures are as shown in Table 5.

Region	COPIS
Scotland and Northern Ireland	£6.92 M
Central	£16.47 M
South East	£11.02 M
South West	£12.45 M

Table 5: COPIS for each regional contract are calculated on a 7 year NPV basis.

38.5. The MEAT scores for each Tender (i.e. for a specific Hard FM Built Estate region) will be calculated in accordance with the formula set out above at paragraph 38.3.



39. WIN RESTRICTIONS

- 39.1. The CCS Framework 6089 Contract Notice released in the OJEU stated that *no one Supplier can win more than two regions* for the Defence Lots.¹
- 39.2. The Buyer will therefore implement Win Restrictions within the Hard FM Built Estate competition at Contract Award.
- 39.3. The Buyer will award the regional contracts to the combination of tenders which offers the lowest combined MEAT score (taking account of the Win Restrictions), in line with the process set out in paragraphs 39.4-39.5.
- 39.4. In the event that there are two or more permutations that result in the same lowest overall MEAT score, the tenders will be awarded on the basis of the permutation that gives the lowest Total Price.
- 39.5. This process may result in:
- 39.5.1. a Tenderer that has bid for more than two regions not being awarded the contract for those regions in which it has the best ranked Tender; and/or;
 - 39.5.2. a Tender which is not the best ranked Tender in a specific region being awarded the contract for that region.
- 39.6. A worked example and the algorithm that the Buyer will use to select the relevant combination of Tenders in accordance with the process set out above are provided at Annex D to this DEFFORM 47.
- 39.7. For the avoidance of doubt, the Win Restrictions set out above apply at Contract Award only and are not intended to prevent future market consolidation and supplier integration through the duration of the contracts. Furthermore, the Buyer expressly reserves the right to award a contract to a Tenderer already holding contracts for two regions in the event that a regional contract is terminated during its term. The Buyer intends to only exercise such a right to award a contract on an interim basis to ensure continuity of service while the Buyer carries out a new tender process for that region.

40. EXECUTIVE SUMMARY

- 40.1. The Tenderer may submit a region specific two-page Executive Summary to support their tender at Tender submission stage.
- 40.2. The Executive Summary will not form part of the Tender Evaluation and will not be marked.

41. QUALITY EVALUATION: COMMERCIAL

- 41.1. A Commercial evaluation will take place to ensure bids are compliant with the ITT documentation.

¹ <https://assets.crowncommercial.gov.uk/wp-content/uploads/RM6089-OJEU-notice.pdf>



41.2. The Commercial evaluation will consist of the items listed in Table 6 and each item will be assessed on a Pass/Fail basis in accordance with the instructions below.

Commercial Element	Compliance Evaluation:	
	Pass	Fail
DEFFORM 47 Offer (Signed)	Pass	Fail
Insurance Response	Pass	Fail
Conditions of Contract	Pass	Fail
Guarantee / Warranty / Bond	Pass	Fail
Pricing Book Submission	Pass	Fail
Commercially Sensitive Information	Pass	Fail

Table 6: Commercial Evaluation

42. COMMERCIAL INSTRUCTIONS

42.1. Any Tenderer who scores a Fail in any of the Commercial Elements listed in Table 6 above shall be removed from the competition and will not be evaluated through the RVFM formula.

43. DEFFORM 47 OFFER (SIGNED) INSTRUCTIONS

43.1. Tenderers will need to complete the DEFFORM 47 Offer form, located at Annex A to this document. A Pass will be achieved if the Offer form is filled in and signed correctly and not qualified in any way. A Fail will be achieved if the Offer Form is not completed or signed or is otherwise qualified.

44. INSURANCE RESPONSE

44.1. The Insurance response will be evaluated by MOD specialist Insurance provider Willis Tower Watson, using the template provided at Annex E.

44.2. The criteria for achieving a Pass or Fail for this aspect of the Commercial evaluation are set out in Annex E.

45. CONDITIONS OF CONTRACT INSTRUCTIONS

45.1. A Pass will be achieved if the Tenderer confirms that it accepts all Conditions of Contract in full without qualification (excluding [TUPE and] Insurance responses which are evaluated as set out above). A Fail will be achieved if the Tenderer is unable to provide this confirmation.

45.2. The Buyer has sought additional content for a number of the draft Call-Off Schedules as part of the Tender response, as defined in Call-Off Schedule 22 – Call Off Tender. This content will not be evaluated for the purposes of this part of the Commercial evaluation.



46. GUARANTEE / WARRANTY / BOND INSTRUCTIONS

- 46.1. Tenderers may be asked to provide a designated Parent Company Guarantee, Collateral Warranty or Performance Bond, as per the form set out in the associated Call Off Schedule.
- 46.2. A Pass will be achieved if the Tenderer confirms that it is willing to provide the security sought. A Fail will be achieved if the Tenderer is unable to provide this confirmation.

47. COMMERCIALY SENSITIVE INFORMATION INSTRUCTIONS

- 47.1. Tenderers must provide a completed Joint Schedule 4 Commercially Sensitive Information response. A Pass will be achieved if a Commercially Sensitive Information response is provided within the tender (including a nil response). A Fail will be achieved if the Commercially Sensitive Information response is not provided.

48. PRICING BOOK SUBMISSION INSTRUCTIONS

- 48.1. A Pass will be achieved if the Tenderer provides a completed Pricing Book Submission. A Fail will be achieved if the Tenderer does not provide a completed Pricing Book Submission.

49. QUALITY EVALUATION: TECHNICAL

- 49.1. The Technical response requirement including the sub-weighting and page limits are described in Table 7. The technical questions are provided in Annex F.
- 49.2. The Technical response is defined in Call-Off Schedule 22 – Call-Off Tender and is summarised below.
- 49.2.1. Part A. Delivering the Services
 - A1. Contract Mobilisation & Demobilisation
 - A2. TUPE
 - A3. Maintenance Services
 - A4. Billable Works Service
 - A5. Helpdesk
 - A6. Health and Safety Management
 - 49.2.2. Part B. Managing the Relationships
 - B1. Management of Sub-contractors and Supply Chain
 - B2. Contract Management
 - 49.2.3. Part C. Asset Management
 - C1. Asset Management
 - 49.2.4. Part D. Demonstrating Value
 - D1. Social Value and Sustainability



Technical Question	Sub weighting	A4 Page Limit	Mandatory Regional Specific Response
Contract Mobilisation & Demobilisation	10%	10	Regional Specific
TUPE	5%	10	Tenderer Discretion
Maintenance Services	15%	20	Regional Specific
Billable Works Service	15%	15	Tenderer Discretion
Helpdesk	5%	5	Tenderer Discretion
Health & Safety Management	5%	15	Tenderer Discretion
Management of Sub-contractors & Supply Chain	15%	10	Regional Specific
Contract Management	10%	10	Tenderer Discretion
Asset Management	15%	15	Regional Specific
Social Value and Sustainability	5%	5	Tenderer Discretion

Table 7: Built Estate Technical Evaluation questions

50. INSTRUCTIONS

- 50.1. Tenderers must submit a response to all Technical Questions.
- 50.2. There is a mandated A4 page count for each Technical question, as set out in Table 7 above. This A4 page limit is inclusive of all drawings & diagrams.
- 50.3. Any aspect of the Technical Response that exceeds the stated page count will not be evaluated and will not be scored within the evaluation process.
- 50.4. Where Plans are explicitly stated to be required within the criteria for the Technical questions these Plans must be submitted but are excluded from the page count.
- 50.5. The Buyer has stated in Table 7 where a mandatory regional specific response must be submitted. For the remaining questions Tenderer's may submit a regional specific response at their discretion.
- 50.6. All responses must be written in Arial font, size 11 and compatible with Microsoft Office 2016 file formats.
- 50.7. More information on how to respond to each Technical question can be found at Annex F.



50.8. Tenderers must provide full and complete technical responses to each of the individual Technical questions. Tenderers must not cross reference their responses to other Technical questions.

51. SCORING

51.1. The Technical questions will be scored using the method set out in Table 8, below.

51.2. The maximum technical score is 100. Tenderers will receive a moderated technical score for each question which will then be multiplied by the assigned technical question sub-weighting to establish a mark out of 100.

51.3. The weighted technical scores will be aggregated to formulate the Final Moderated Tenderer Technical Score.

Score	Rationale
10	Excellent Response – The response, having regard to the Aim and Criteria, gives the Buyer very high confidence that Deliverables will be delivered in all respects and substantial additional benefit and value will be created and demonstrated through contract delivery.
8	High Confidence Response – The response, having regard to the Aim and Criteria, gives the Buyer high confidence that Deliverables will be delivered in all respects and some additional benefits and value will be created and demonstrated through contract delivery.
6	Acceptable Response – The response, having regard to the Aim and Criteria, gives the Buyer satisfactory confidence that Deliverables will be delivered and is otherwise an adequate and acceptable response.
2	Poor response – The response, having regard to the Aim and Criteria, gives the Buyer low confidence that all the material Deliverables will be delivered, and it's considered to demonstrate additional risk that a fully compliant performance will not be delivered.
0	Unacceptable Response – The response, having regard to the Aim and Criteria, presents significant risks that one or more material Deliverables will not be delivered, leading to increased cost to the Buyer or risk to service delivery.

Table 8: FDIS Built Estate Scoring mechanism

52. MINIMUM THRESHOLDS

52.1. If any Tenderer scores:

52.1.1. Unacceptable (0) for one or more Technical questions;

52.1.2. Poor Response (2) for three or more Technical questions;

that Tenderer will be removed from the competition and will not be evaluated through the RVFM formula.



53. QUALITY EVALUATION: BEHAVIOURAL & COLLABORATIVE ASSESSMENT: BACKGROUND & OVERVIEW

53.1. The Behavioural & Collaborative Assessment (BCA) will only be carried out once and the results will be applied when assessing the MEAT for each regional contract (i.e. the same score will be applied when carrying out the MEAT calculation for each regional contract). The BCA will use four assessment methods:

- Team behavioural assessment
- Board level interviews
- Site visits (for both validation of the Board level interviews and deployed collaboration approach assessment)
- Team workshop written output assessment

53.2. The BCA has been assigned a total of 25% of the Quality evaluation.

53.3. The BCA will take place between December 2019 – February 2020. The exact timings for each Tenderer and further information will be issued closer to the commencement of the BCA.

53.4. The BCA will be scored out of 100 and Table 9 outlines the weighting assigned to each assessment method.

No	Assessment activity	Weighting %
1	Team Behavioural Assessment	40%
2	Board level Interviews & Site Visit Validation	28%
3	Site Visit Additional Assessment	16%
4	Team workshop written output submission	16%
Total		100%

Table 9: Table of behavioural weighting assessment method

Participants

53.5. Following the issue of this ITT, the Buyer will issue a registration form for all Tenderer individuals who will take place in the BCA (i.e. Board level managers, Key People in the team workshop and those participating in the Site Visits, plus proposed reserve participants). Tenderers will be required to complete this form and return it to the Buyer by a date to be confirmed

53.6. If an individual is unable to attend an element of the BCA due to illness or unavoidable events, the Tenderer must notify the Buyer as soon as possible and confirm the reserve participant who will take part in that individual's place.

54. TEAM BEHAVIOURAL ASSESSMENT

Overview

54.1. The one-day Team Behavioural Assessment workshop will include several assessed activities, including tasks which will require the Tenderer's Key People to work with the Buyer's team. Each task will be presented on the day with



instructions for developing a response to the task within a given time frame. Details of the venue, date, an outline of the workshop agenda and timing will be confirmed by the Buyer by email in advance of the assessment.

Participants

54.2. Each Tenderer must provide ten (10) participants, who will be engaged in the Team Assessment, plus two reserves. The 10 Key People roles required are defined below.

- Project / Programme Manager
- Authorised Engineers / Authorised Persons
- Asset Manager
- Supplier Operations Director
- Supply Chain / Contract Manager
- Contract Quality Manager
- Contract SHEF Manager
- IT / Data Manager
- Customer Stakeholder Manager
- Lead Cost Manager/ Commercial

Reserves

- Tenderer to Nominate

54.3. Where the Tenderer is a consortium (or similar), team members should be representative of all relevant organisations.

54.4. The instructions for the assessment will be issued during the tender response period. On the day of the Team Assessment, participants must bring photographic identification (e.g. passport or driving licence).

54.5. The Buyer will field circa 10 people to take part in the Assessment Workshop. The Buyer will also provide an Assessor team to assess and evaluate the Tenderer team. The assessment process will be facilitated and managed by an external behavioural specialist.

Criteria and Weightings

54.6. The Tenderer will be assessed in relation to the criteria and sub criteria described in Table 10 below. This element of the BCA has 40% allocated with criteria level weightings noted in Table 9. The sub-criteria are equally weighted.



Criterion 1	Effective Team Working		Weighting	8%
Engaging with clients and own colleagues by using effective interpersonal behaviours to build an environment of collaboration and positive and productive relationships, that utilises all the team in the development & delivery of shared objectives				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Collaboratively engages to develop and deliver shared objectives	Engages to build positive and productive relationships through effective interpersonal behaviours	Creates an environment for collaboration with client team and their own team	Makes best and productive use of all team talents and resources across the joint team	
Criterion 2	Managing Change & Uncertainty		Weighting	8%
Remaining focused when dealing with uncertainty and having the flexibility to adapt plans and engage with people to effectively manage any changes in approach				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Remains focused & resilient in the face of uncertainty and obstacles	Demonstrates willingness & flexibility to change plans as needed	Reassures & involves others in working through change and / or uncertainty	Adapts plans and approach to changing circumstances	
Criterion 3	Performance (Delivery)		Weighting	10%
Delivering outcomes by managing and monitoring time and resources to ensure that actions are addressed, and plans are robustly pursued when faced with obstacles				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Manages time and resources to deliver outcomes	Displays commitment to achieving task success in the face of obstacles	Monitors delivery to plans & agreed performance indicators, makes appropriate adjustments when required	Takes accountability for addressing the task & achieving results	
Criterion 4	Analysis, Planning & Problem Solving		Weighting	8%
Taking a systematic approach to analysing the problem and developing an agreed solution that is adequately resourced and reviewed to assure risks are managed, outcomes are successful, and any lessons are learnt.				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Defines the problem/causes or challenges in a systematic way	Manages time & resources to deliver plans/solutions	Reviews a range of options/potential solutions and risks before making decisions	Reviews and assures their approach & or identifies lessons for improvement	
Criterion 5	Stakeholder Engagement & Management		Weighting	4%
Understanding & anticipating the issues & challenges faced by stakeholders & developing approaches to engage & work with the relevant stakeholders to manage differences in priorities or opinions				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Anticipates challenges and issues potentially impacting stakeholders	Demonstrates an understanding of, and insight into, stakeholder concerns and priorities	Considers different methods for engaging and including relevant stakeholders.	Manages differences in priorities and perspectives across stakeholders	
Criterion 6	Engendering Trust		Weighting	2%
Interacting in a way that fosters integrity, respect and confidence in their capability and competence to understand and address other people's needs and concerns				
Sub Criterion 1	Sub Criterion 2	Sub Criterion 3	Sub Criterion 4	
Displays behaviours that foster integrity and respect	Interacts in a way that gives confidence in their capability and competence	Communicates an understanding of others needs and concerns	Meets commitments that contribute to addressing others concerns and goals	

Table 10: Criteria, Sub-Criteria & Criteria Weighting



54.11. There will be a Minimum Questionnaire Score of 50 (50 x 1) and a Maximum Questionnaire Score of 300 (50 x 6) for each completed questionnaire. The worked example in Table 13 below demonstrates how criterion 6 will be scored.

Calculation Reference	A	B	C	D	E	F	G	H	I	J	$K = \sum A \text{ to } J$	$L = K / 10$	$P = \frac{[(L-N)/(O-N)] * 100}{}$
DIO Participant	1	2	3	4	5	6	7	8	9	10	Questionnaire Scores	Tenderer Questionnaire Score	Trust Criterion % Score
DIO Participant Questionnaire Score	178	186	250	200	190	208	215	200	201	192	2020	202	60.80%
Minimum (N)	50	50	50	50	50	50	50	50	50	50	500	50	0
Maximum (O)	300	300	300	300	300	300	300	300	300	300	3000	300	100

Table 13: Tenderer Trust Criterion Percentage Score

55. BOARD LEVEL INTERVIEWS

Overview

55.1. The Board level Interviews will be a group-based interview comprising of three (3) Board level managers with each participant being scored individually. The questions will be both behavioural based (related to the individual's behaviours) and approach based (related to the organisation's collaborative working approaches). The interview will last approximately 2 hours with questions directed to individuals or to the group in general. Interview questions will be common across all Tenderer interviews.

Participants

55.2. To ensure consistency, 'board-level' manager is not defined by a hierarchical position but by accountability and knowledge of organisational collaboration approaches. Where the Tenderer is a consortium (or similar), representatives should be selected from each organisation (up to three organisations).

55.3. The Buyer will provide an interview panel to conduct the interview comprising of MOD senior managers and 1 professional behavioural assessor/interview manager.

Criteria and Weightings

55.4. Each Interviewee will be tested on 2 criteria areas linked to Personal Behaviours and Organisational Collaboration Approach (Table 10), which will be scored independently resulting in two separate scores using the assessment and scoring approach noted below. The criteria and sub-criteria are weighted as set out in Table 14.



Assessment Aspect		
Criterion	Personal Behavioural Approach	Organisational Collaboration Approach
Criterion 1. Effective Team Working		
Descriptor	Engaging with clients and own colleagues by using effective interpersonal behaviours to build an environment of collaboration and positive and productive relationships, that utilises all the team in the development and delivery of shared objectives	Approaches (processes, structures) for engaging with clients and other stakeholders build and continually improve an environment of effective collaboration for the delivery of shared objectives
Sub Criterion 1	Collaboratively engages to develop and deliver shared objectives	Processes and structures to jointly develop and manage the delivery of shared objectives
Sub Criterion 2	Engages to build positive and productive relationships through effective interpersonal behaviours	Processes/structures to develop and socialise expectations of collaborative behaviours across the parties
Sub Criterion 3	Creates an environment for collaboration with client team and their own team	Approaches to monitor, evaluate and improve collaborative behaviours and processes for collaboration
Sub Criterion 4	Makes best and productive use of all team talents and resources across the joint team	Approaches to jointly manage the team's and individuals' talents and competencies
Criterion 2. Performance (Delivery)		
Descriptor	Delivering outcomes by managing and monitoring time and resources to ensure that actions are addressed, and plans are robustly pursued when faced with obstacles and only adjusted when appropriate	Delivering outcomes by jointly managing and monitoring contract performance, ensuring delivery plans are robustly pursued when faced with obstacles
Sub Criterion 1	Manages time and resources to deliver outcomes	Jointly manages programme and resources to deliver outcomes
Sub Criterion 2	Displays commitment to achieving task success in the face of obstacles	Approaches to jointly achieving task success and jointly managing any risks to success
Sub Criterion 3	Monitors delivery to plans and agreed performance indicators, makes appropriate adjustments when required	Jointly monitors delivery to plans and agreed performance indicators, makes appropriate adjustments when required
Sub Criterion 4	Takes accountability for addressing the task and achieving results	Processes to assure accountability for addressing tasks and achieving results
Weightings		
Interview	16%	12%
Criterion	Equally weighted	Equally weighted
Sub Criterion	Equally weighted	Equally weighted

Table 14: Interview Criteria

Interview Assessment and Scoring Approach

55.5. The individual interviewees will be scored using the scoring methodology set out in Table 15 below.



Score	Confidence Level	Response Assessment			
6	High	Always	Usually	Frequently	Sometimes
5	Medium	Usually	Frequently	Sometimes	Occasionally
4	Medium	Sometimes	Occasionally	Rarely	No
3	Low	Occasionally	Rarely	No	
2	Low	No			
1	Low				
0	Low				

Definition of scoring terms

Depth, Impact & Level	No	Rarely	Occasionally	Sometimes	Frequently	Usually	Always
Frequency Scale	0% of responses	In less than 10% of responses	In 10-25% of responses	In 26-50% of responses	In 51-75% of responses	In 76-90% of responses	In 91-100% of responses

Table 16: Definition of scoring terms

55.6. In scoring on the 0-6 scale, as per Table 16, the Buyer will use the [redacted]

6	Always	Usually
5	Usually	Frequently
4	Sometimes	Occasionally
3	Occasionally	Rarely
2	Rarely	No
1	No	
0		



56. SITE INTERVIEWS & BOARD INTERVIEW VALIDATION

Overview

56.1. The site visit will be conducted over a half day. Site Interviews will be conducted as a group interview over two hours. Interview questions will be common across all Tenderers' interviews. Questions may be directed at individuals or the group in general. Questions will include:

- Repeat of the Board Level interview questions for the Organisational Collaboration Approach for the purposes of validation
- Questions related to approaches deployed at site to promote effective collaborative working

56.2. The site should make available an interview room as well as a room for the assessors to conduct their scoring and moderation, which will take up to 2 hours.

Participants

56.3. The Tenderer is to provide the Buyer with details of 3 nominated UK-based sites for the Site Interview Visit by 25 October 2019 to Buyer's email. These should be comparable in nature / size / complexity to the FDIS BE contract and represent at least one of the Tenderer organisations (if a consortium or similar). The interviewees must have a sound understanding of their nominated site's collaboration practices.

56.4. The Buyer will inform the Tenderer of the site to be visited 48 hours in advance of the site visit.

56.5. The Tenderer's representatives should include the senior operational manager and 5 key delivery roles. Where site operations are delivered by a consortium, representatives of those organisations should be included in the site interview team. The team should have knowledge of site-based operational practices and approaches to promote effective collaboration and delivery performance management.

56.6. The Buyer will provide an interview panel to conduct the interview comprising of two (2) DIO trainer assessors and one (1) professional behavioural assessor/interview manager.

Criteria and Weightings

56.7. The Site interview team will be questioned in relation to two (2) criteria areas linked to Site Collaboration Approaches, described in the Board Level interviews, and Additional Site Practices to Support Collaborative Working, which will be scored independently resulting in two separate scores using the assessment and scoring approach noted below. The criteria and sub-criteria are weighted as set out in Table 19.

56.8. The Site Collaboration Approaches aspect will be used to validate the Board Level Interview Organisational Collaboration Approaches.



Assessment Aspect		
Criterion	Site Collaboration Approaches	Additional Site Practices to Support Collaborative Working
Criterion 1. Effective Team Working		
Description	Approaches (processes, structures) for engaging with clients and other stakeholders build and continually improve an environment of effective collaboration for the delivery of shared objectives	Approaches (processes, structures) for engaging with clients and other stakeholders build and continually improve an environment of effective collaboration for the delivery of shared objectives
Sub Criterion 1	Processes and structures to jointly develop and manage the delivery of shared objectives	Processes to jointly raise awareness of the shared objectives and delivery targets
Sub Criterion 2	Processes/structures to develop and socialise expectations of collaborative behaviours across the parties	Processes or approaches to socialise and share knowledge and information between teams and individuals
Sub Criterion 3	Approaches to monitor, evaluate and improve collaborative behaviours and processes for collaboration	Processes to jointly resolve issues or disputes to all parties for mutual benefit
Sub Criterion 4	Approaches to jointly manage the team's and individuals' talents and competencies	Approaches to reward and recognise the team and individuals' talents for working collaboratively
Criterion 2. Performance (Delivery)		
Description	Delivering outcomes by jointly managing and monitoring contract performance, ensuring delivery plans are robustly pursued when faced with obstacles	Delivering outcomes by jointly managing and monitoring contract performance, ensuring delivery plans are robustly pursued when faced with obstacles
Sub Criterion 1	Jointly manages programme and resources to deliver outcomes	Approaches to jointly manage continuous improvement
Sub Criterion 2	Approaches to jointly achieving task success and jointly managing any risks to success	Approaches to jointly manage opportunities to add value or improve the task delivery
Sub Criterion 3	Jointly monitors delivery to plans and agreed performance indicators, makes appropriate adjustments when required	Approaches to jointly monitor improvements, efficiencies and realise benefits
Sub Criterion 4	Processes to assure accountability for addressing tasks and achieving results	Approaches to jointly work at delivering efficiencies and realisation
Weightings		
Interview	6%	10%
Criterion	Equally weighted	Equally weighted
Sub Criterion	Equally weighted	Equally weighted

Table 19: Site Interview Criteria

Interview Assessment and Scoring Approach

56.9. The interview participants will be questioned and scored by the assessors' panel using the scoring methodology set out in Table 15 Scoring Methodology for Interviews. In scoring the concern / confidence levels, the assessors will score the interview responses on the 0-6 scale, as per Table 15, [REDACTED]



56.10. [Redacted]. The maximum score for each interview is 42 (Maximum = (2x(3x6))+6).

56.11. Each assessor will record the evidence separately during the interview. Following the interview, the assessors will individually score the interview. All Assessors will meet for a moderation session and will agree the evidence within the Interview. The final Interview Score will be the mean average of the Moderated Interview Scores for each of the Tenderer Participants.



[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

57. WRITTEN OUTPUT SUBMISSION

Overview

- 57.1. In the Team Behavioural Assessment, the Tenderer will be tasked to address a number of exercises. One or more of these tasks will be designated on the day as the Written Output(s), which will subsequently be assessed as a written tender submission. The task or tasks to produce the Written Output(s) will be presented with accompanying guidance on what the written response should address.
- 57.2. The Tenderer will be allowed to remove the Written Output(s) produced in the Team Assessment to enable them to be developed into a tender return. The developed Written Output(s) must then be returned to the Buyer within five (5) business days from the Team Assessment Workshop. The returned submission or submissions should not add or remove key features developed in the workshop (see further below in Table 22). The returned Written Output(s) will be validated in relation to the original material produced in the Team Assessment Workshop.

	Development Activity
Permissible	<ul style="list-style-type: none"> • Spelling or formatting to aid comprehension • Minor text changes to aid comprehension • Re-ordering of lists • Development of graphics to communicate the content • Formatting into the DIO requirements for written tender submissions
Non-Permissible	<ul style="list-style-type: none"> • Addition or removal of text that impacts comprehension • No substantive additional material • No substantive removal of material • Changing any timescales allocated to activities • Changing any owners allocated to activities

Table 22:Written Output Development Activity

- 57.3. If a Tenderer's Written Output includes elements of non-permissible development activity according to Table 22, the Buyer reserves the right to award the Tenderer a score of 0 for this element of the BCA. A score of 0 in the BCA will not result in the Tenderer being excluded.

Criteria and Weightings

- 57.4. As set out in Table 23, each Tenderer's Written Output will be tested on 2 criteria areas.



	Assessment Criterion	Criterion Definition	Positive Indicators	Weighting %
1	Effective Team Working	Approaches for engaging with clients and other stakeholders build and continually improve an environment of effective collaboration for the delivery of shared objectives	Positive Indicators will be issued during the Team Assessment as a part of the written task	Criterion and Positive Indicators are evenly weighted
2	Performance (Delivery)	Delivering outcomes by jointly managing and monitoring contract performance, ensuring delivery plans are robustly pursued when faced with obstacles	Positive Indicators will be issued during the Team Assessment as a part of the written task	Criterion and Positive Indicators are evenly weighted

Table 23:Written Output Criteria

Written Output Assessment and Scoring

57.5. Assessors will assess the extent to which Written Output satisfies the criteria in Table 243 in accordance with the methodology set out in Table 254.

Score	Response Level	Rationale
10	Excellent Response	The response, having regard to the Aim and Criteria, gives the buyer very high confidence that Deliverables will be met in all respects and substantial additional benefit and value will be created and demonstrated through contract delivery.
8	High Confidence Response	The response, having regard to the Aim and Criteria, gives the buyer high confidence that Deliverables will be met in all respects and some additional benefits and value will be created and demonstrated through contract delivery.
6	Acceptable Response	The response, having regard to the Aim and Criteria, gives the buyer satisfactory confidence that Deliverables will be delivered and is otherwise an adequate and acceptable response.
2	Poor Response	The response, having regard to the Aim and Criteria, gives the buyer low confidence that all the material Deliverables will be met, and it's considered to demonstrate additional risk that a fully compliant performance will not be delivered.
0	Unacceptable Response	The response, having regard to the Aim and Criteria, presents significant risks that one or more material Deliverables will not be met, leading to increased cost to the buyer or risk to service delivery.

Table 24: Scoring methodology for Written Outputs

57.6. Each assessor will evaluate and score the Written Output(s) separately. The assessors will meet for a moderation session and will agree the evidence for all Written Output(s). Each Written Output will have a Criteria Total Score from each of the Assessors assessing them. These will be moderated so that each Tenderer



Written Output will have a single Moderated Written Output Score.

57.7. There is a total maximum mark of 10 available for each Criterion Score in Table 23. The two Criterion Scores are summed to derive a Maximum Written Output Score of 20: (Maximum = 10 +10 = 20). The maximum score for the Written Output is 20 thus the assessors' Moderated Written Output Score is therefore between 0 and 20. The Tenderer's Written Output Score will be divided by the Maximum Written Output Score available (20) in order to calculate a Tenderer Written Output Percentage Score.

Criterion	Effective Team Working			Performance		
	Assessor 1	Assessor 2	Assessor 3	Assessor 1	Assessor 2	Assessor 3
Response Level	6	6	8	8	8	8
Moderated Score	6 (A)			8 (B)		
Written Output Score C=A+B	14					
Written Output Score % D=(C/20) *100	70%					

Table 25: Written Output Percentage Score Example (for one Written Output)

58. BCA: SCORE INTEGRATION

Overview

58.1. Following the conclusion of all the separate assessment methods for the BCA, the scores will be integrated into an overall weighted score for the BCA as a whole.

Assessment Methods' Scores integration

58.2. The Assessment Methods' percentage scores are derived using the calculations described in Sections 2 to 5.

58.3. Table 26 indicates how the assessments' Percentage Scores are linked to the Assessments' Weightings in Table 9 (also see headings (X%)) to derive the Weighted Score. It indicates how the BCA Assessment Methods total scores are summed to derive an Overall Weighted Score (%) out of the 100%. Note the Percentage Scores (Score %) are examples for illustrative purpose only.



Assessment Element		Assessment Aspect	Score %	Weighting %	Weighted Score %	Total Weighted Score	Overall Weighted Score
Team Assessment (40%)	Criteria	Collaborative Working	70.00	8	5.6	23.116	58.460
		Managing Change & Uncertainty	40.00	8	3.2		
		Performance (Delivery)	75.00	10	7.5		
		Analysis, Planning & Problem Solving	45.00	8	3.6		
		Stakeholder Engagement	50.00	4	2		
		Engendering Trust	60.80	2	1.216		
Interviews Assessment (44%)	Board level Aspect (28%)	Personal Behaviours Approach	58.73	16	9.3968	24.144	
		Organisational Collaboration Approaches	53.40	12	8.874		
	Site Visit Aspect (16%)	Site Collaboration Approaches	45.20	6	Combined Method ((53.4+45.2)/2) x (0.12+0.06)		
		Additional Site Practices to Support Collaborative Working	58.73	10	5.873		
Written Assessment (16%)		Written Output	70.00	16	11.200	11.200	

Table 26: Assessment Method Score integration
(Example is Tenderer B in Paragraph 59.4)



59. COMBINED QUALITY SCORE

59.1. The sum of the Technical & Collaborative Behaviour weighted scores will formulate the Tenderer's overall Quality score. The Quality score will be marked to 2 decimal places.

59.2. The final Quality score will be marked out of 100 with the associated weighted split as Technical 75% and Collaboration 25%.

59.3. Table 27 below demonstrates an illustrative example (Annex D) of how the final Quality score is formulated for Technical.

Tenderer	Technical Weighted Score	Quality: Technical Weighting	Final Technical Score (Weighted Score x Collaboration Weighting)
A	48.00	75%	36.00
B	67.00	75%	50.25
C	84.00	75%	63.00
D	90.00	75%	67.50
E	60.00	75%	45.00

Table 27: Final Quality Score: Technical

59.4. Table 28 below demonstrates an illustrative example (Annex D) how the final Quality score is formulated for Collaboration.

Tenderer	Collaboration Weighted Score	Quality: Collaboration Weighting	Final Collaboration Score (Weighted Score x Collaboration Weighting)
A	40.41	25%	10.10
B	58.46	25%	14.62
C	64.35	25%	16.09
D	86.48	25%	21.62
E	43.57	25%	10.89

Table 28: Final Quality Score: Collaboration

59.5. Table 29 below demonstrates an illustrative example (Annex D) how the Technical and Collaboration weighted scores are aggregated to formulate the Tenderer's final Quality score.

59.6. The final Quality score will be calculated within the Real Value for Money formula to determine the Tenderer's Final MEAT score.



Tenderer	Final Technical Weighted Score	Collaboration Weighted Score	Final Combined Quality Score (out of 100)	Rank	Notes
A	36.00	10.10	46.10	N/A	Disqualified: did not reach Quality Threshold
B	50.25	14.62	64.87	3	
C	63.00	16.09	79.09	2	
D	67.50	21.62	89.12	1	
E	45.00	10.89	55.89	4	

Table 29: Final Quality Score

60. PRICE EVALUATION

60.1. All Tenderers are to follow the Pricing Instructions contained in Call-Off Schedule 29 – Rates and Prices and provide final pricing rates in the provided FDIS Pricing Document HFM.

60.2. All Tendered prices will be converted as per Paragraph 62 Net Present Value prior to the Real Value for Money formula being applied.

61. LOW COST BID REFERRALS

61.1. Tenderers must comply with the Government Commercial Function's Outsourcing Playbook strategy for Low Cost Bid Referrals.

61.2. Any submitted Tenders with a price which is 10% lower than the average of all received Tenders will be referred to Central Assurance and Scrutiny for review. This will apply on a regional basis.

61.3. MOD reserves the right to remove any Tenderer from the competition following a Tender review by Central Assurance and Scrutiny if it is considered that a Tender is abnormally low, and a Tenderer is unable to provide adequate justification to ensure that the price submitted is accurate and sustainable.

62. NET PRESENT VALUE

[REDACTED]

[REDACTED]

62.1. [REDACTED]

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]									
[REDACTED]									
[REDACTED]	[REDACTED]								[REDACTED]
[REDACTED]									
[REDACTED]									
[REDACTED]									
[REDACTED]									

Table 30: Worked Example Net Present Value



ADDITIONAL TENDER REQUIREMENTS

ANNEXES A - I



Ministry of Defence

Tender Ref No:

TENDER SUBMISSION DOCUMENT (OFFER)

To the Secretary of State for Defence of the United Kingdom of Great Britain and Northern Ireland (hereafter called "the Buyer")

The undersigned Tenderer, having read the ITT Documentation, offers to supply the Contractor Deliverables at the stated price(s), in accordance with any referenced drawings and / or specifications, subject to the Conditions of Tendering. It is agreed that only the Contract Conditions or any amendments issued by the Buyer shall apply.

Applicable Law				
I agree that any contract resulting from this competition shall be subject to English Law *Where 'No' is selected, Scots Law will apply.				Yes / No*
Total Value of Tender (excluding VAT)				
£				
WORDS				
UK Value Added Tax				
If registered for Value Added Tax purposes, please insert:				
a. Registration No				
b. Total amount of Value Added Tax payable on this Tender (at current rate(s)) £.....				
Location of work (town / city) where contract will be performed by Prime:				
Where items which are subject of your Tender are not supplied or provided by you, state location in town / city to be performed column (continue on another page if required)				
Tier 1 Sub-contractor Company Name	Town / city to be Performed	Contractor Deliverables	Estimated Value	SME Yes / No



Mandatory Declarations (further details are contained in Appendix 1 to DEFFORM 47 Annex A (Offer)):			Tenderer's Declaration	
Is the offer subject to the Buyer contracting for all the Contractor Deliverables?			Yes* / No	
Is the offer made subject to a Minimum Order Quantity?			Yes* / No	
Are the Contractor Deliverables subject to IPR that has been exclusively or part funded by Private Venture, Foreign Investment or otherwise than by Buyer funding?			Yes* / No	
Are the Contractor Deliverables subject to Foreign Export Control and Security Restrictions? If the answer is Yes, please complete and attach DEFFORM 528			Yes* / No	
Have you obtained foreign export approval necessary to secure IP user rights for the Buyer in Contract Deliverables, including technical data, as determined in the Contract Conditions?			Yes* / No	
Have you provided details of how you will comply with all regulations relating to the operation of the collection of custom import duties, including the proposed Customs procedure to be used and an estimate of duties to be incurred or suspended? ¹			Yes / No	
Have you completed Form 1686 for sub-contracts?			Yes / No	
Have you completed the compliance matrix/ matrices?			Yes / No / Not Required	
Are you a Small Medium Sized Enterprise (SME)?			Yes / No	
Have you and your sub-contractors registered with the Prompt Payment Code with regards to SMEs?			Yes / No	
Have you completed and attached Tenderer's Commercially Sensitive Information Form (DEFFORM 539A)?			Yes / No	
If you have not previously submitted a Statement Relating to Good Standing, or circumstances have changed have you attached a revised version?			Yes* / No / N/A	
Do the Contractor Deliverables contain Asbestos, as defined by the control of Asbestos Regulations 2012?			Yes* / No	
Have you completed and attached a DEFFORM 68 - Hazardous Articles, Deliverables materials or substances statement?			Yes* / No	
Do the Contractor Deliverables (including Packaging) use Substances that deplete the Ozone Layer, as defined in Regulation (EC) 1005/2009 (as amended by EC 744/2010) of the European Parliament and of the Council.			Yes* / No	
Have you attached The Bank / Parent Company Guarantee? ³			Yes* / No / Not Required	
Have you complied with the requirements of the Military Aviation Authority Regulatory Articles? ²			Yes / No / Not Required	
Have you completed the additional Mandatory Requirements?			Yes / No / Not Required	
*If selecting Yes to any of the above questions, please attach the information detailed in Appendix 1 to DEFFORM 47 Annex A (Offer).				



(Tenderer's Name)	Dunn And Bradstreet number:
-------------------	------------------------------------

Notes to TENDER SUBMISSION DOCUMENT (OFFER)		
1	Import Duties	<p>If the supplier is importing goods from inside the EU it is important to understand whether those goods will be subject to Customs duty. There are many Customs procedures and it is the supplier's responsibility to inform the MOD which one they intend to use. In making their decision they may choose to either pay or suspend duties dependent on the procedure:</p> <ul style="list-style-type: none"> • Pay - if they pay the duty, they may pass these costs onto the MOD. There could be an advantage to having the goods delivered into 'free circulation', as this means they will be free from Customs control measures. • Suspend - if they suspend the duty, it is likely that the goods will require some form of additional Customs control measures and the MOD will need to take appropriate action. However, the benefit of suspending the duty may result in a cost saving. <p>The MOD should not instruct suppliers to use a specific procedure; doing so may make the MOD partially liable for any failures on the supplier's part. However, it is possible to challenge the contractor's planned use of a procedure or suggest others for them to consider, which may be beneficial to the MOD.</p> <p>It is important to understand and balance these factors, as there are advantages and disadvantages to each and potential 'hidden' costs to add into any subsequent value for money decision.</p> <p>See the Import and Export Matters CPS for more guidance on Customs issues and JSP 916 for more information on the types of Customs procedures available to suppliers.</p>
2	Military Aviation Authority (MAA) Requirements	The default is MAA requirements are not required. If you are procuring anything relating to aviation you should select the second option.
3	Parent Company / Bank Guarantee	<p>You must only seek a Parent Company / Bank Guarantee at the stage where you identify the company concerned as the preferred Tenderer in all other aspects i.e. most favourable / compliant Tender. If during the Supplier Selection phase you have identified a potential requirement for one you should select the second option. You must seek CLS-CL advice if you have trouble obtaining a Parent Company or Bank Guarantee, or if the company requests a revision to the template DEFFORMs or provides its own template for the MOD to agree.</p>



ANNEX B - MOD SITE VISIT PROTOCOL FOR TENDERERS

Purpose of briefing

To give guidance to Tenderers when attending Establishment visits for the FDIS Hard Facilities Management (HFM) Regional competitive procurement.

Aim of the visit to enable Industry to:

- Understand the culture of the sites.
- Support Tenderer in their bid to submit a competitive Tender.
- Visit and assess the Built Estate.
- Gain an understanding of the differing Establishments.
- Give Tenderers an opportunity to gather “on-site” information that enhances that available in the VDR in order to provide a competitive bid for contracts.
- Provide an opportunity for Q&As, which will be co-ordinated through the clarification process.
- To invite Tenderers to understand the requirement through observation of a range of services currently provided and view facilities and buildings on a selection of Establishments within a Region.

Conflict of Interest:

Tenderers must declare, prior to the Establishment visit, if they have any relationship with any of the hosting team attending to Commercial Officer.

Prior to the Visit:

All Tenderers are to ensure the following:

- Provision of a photographic form of identification for each visit (e.g. Driving Licence, Identity Card, Passport etc).
- Provision and confirmation of request details of those attending the visit five (5) days prior to ensure security arrangements are in place.
- Establish and arrange for personal protective clothing appropriate for the visit.

Format of the Visit:

All Tenderers will have received an Agenda ahead of the date of the visit.

The expected structure of the visit is to be as follows:

- Introduction and Health and Safety Briefing
- Structure and Timings for the Establishment visit
- Groups and tours

Compliance with EU Regulations:

MOD is obliged to ensure any competitive procurement is compliant with EU Regulation principles of transparency, proportionality, non-discrimination, fair treatment and mutual recognition. To ensure this is achieved all participants are requested to observe the following:



- All participants are required to wear their badge at all times.
- All members of the tour group must remain with their host to ensure all participants receive the same information and the Agenda can be maintained.
- Taking photos is strictly prohibited. Photographs are provided on AWARD via the VDR. If you have a specific request, please request this from your host during the tour or during the Question and Answer session. The photographs will be taken by the FDIS Project Team and posted on the VDR with access to all Tenderers.
- Clarification questions regarding the services must be noted and asked at the Question and Answer session or via AWARD to ensure these are logged and all participants receive the same information, unless it is specifically linked to participants Intellectual Property.

Finally, we would like to thank you for your co-operation during the establishment Visit.



ANNEX C - CERTIFICATE OF COMPLIANCE – IDENTICAL TENDER

We hereby confirm that ITT Tender Submission on AWARD and Hard Copy are identical.

Signed:

Name:

Position:

Tenderer:

Address:

.....

.....

.....

.....

Telephone:

Mobile:

Email:

Facsimile:



ANNEX D: EVALUATION WORKED EXAMPLES

63. REAL VALUE FOR MONEY: WORKED EXAMPLE

63.1. The following is an illustrative example of the RVFM calculation applied to five hypothetical Tenders submitted in response to a fictitious procurement with a value of around £1 billion. This example must **NOT** be taken as an indication of expected functionality or tender price.

[REDACTED]

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table 31: Worked example of the Real Value for Money evaluation calculation.



64. TECHNICAL EVALUATION: WORKED EXAMPLE

64.1. A worked example for the Technical response is provided below in Table 32.

Technical Question	Sub weighting	Max Technical Score	Tenderer A		Tenderer B		Tenderer C		Tenderer D		Tenderer E	
			Weighted Technical Score	Weighted Technical Score								
			Score	Moderated Weighted Score. Score x Sub weighting (x10)	Score	Moderated Weighted Score. Score x Sub weighting (x10)	Score	Moderated Weighted Score. Score x Sub weighting (x10)	Score	Moderated Weighted Score. Score x Sub weighting (x10)	Score	Moderated Weighted Score. Score x Sub weighting (x10)
Contract Mobilisation & Demobilisation	10%	10	6	6	6	6	10	10	8	8	6	6
TUPE	5%	10	6	3	6	4	8	4	10	5	6	3
Maintenance Services	15%	10	6	9	8	9	10	15	10	15	6	9
Billable Works Service	15%	10	2	3	8	12	8	12	8	12	6	9
Helpdesk	5%	10	6	3	6	3	6	3	6	3	6	3
Health and Safety Management	5%	10	6	3	6	3	6	3	10	5	6	3
Management of Sub-contractors and Supply Chain	15%	10	2	3	8	12	10	15	8	12	6	9
Contract Management	10%	10	6	6	6	6	6	6	10	10	6	6
Asset Management	15%	10	6	9	6	9	8	12	10	15	6	9
Social Value and Sustainability	5%	10	6	3	6	3	8	4	10	5	6	3
Final Moderated Tenderer Technical Score				48		67		84		90		60

Table 32: Worked Example: Technical Scores



65. COLLABORATION EVALUATION: WORKED EXAMPLE

65.1. A full worked example for each of the four collaboration assessment methods are detailed in Table 33 below.

Collaboration Assessment		Team Assessment 40%						Interviews Assessment				Written Assessment 16%	Total
								Board level Aspect 28%		Site Visit Aspect 16%			
Assessment Criterion	Effective Team Working	Managing Change & Uncertainty	Performance (Delivery)	Analysis, Planning & Problem Solving	Stakeholder Engagement	Engendering Trust	Personal Behaviours Approach	Organisational Collaboration Approaches	Site Collaboration Approaches	Additional Site Practices to Support Collaborative Working	Written Output		
	Criteria sub-Weighting	8%	8%	10%	8%	4%	2%	16%	12%	6%	10%	16%	100%
Tender A	Moderated Score	45	25	30	30	28	40	45	44.2	39	32	60	40.41 (Aggregate Total Weighted Scores)
	Weighted Score (Score x Sub Weighting)	3.6	2	3	2.4	1.12	0.8	7.2	7.488 Combined Method ((44.2+39) /2) X (0.12+0.06)	3.2	9.6		
	Total Weighted Score (Assessment Sum)	12.92						17.88				9.6	
Tender B	Moderated Score	70	40	75	45	50	60.8	58.73	53.4	45.2	58.73	70	58.46 (Aggregate Total Weighted Scores)
	Weighted Score (Score x Sub Weighting)	5.6	3.2	7.5	3.6	2	1.216	9.397	8.874 Combined Method ((53.2+45.2) /2) X (0.12+0.06)	5.873	11.2		



	Total Weighted Score (Assessment Sum)	23.116						24.144				11.2	
Tender C	Moderated Score	75	50	75	43	55	60.8	65	57	54	68	80	64.35 (Aggregate Total Weighted Scores)
	Weighted Score (Score x Sub Weighting)	6	4	7.5	3.44	2.2	1.216	10.4	9.99 Combined Method ((57+54) /2) X (0.12+0.06)		6.8	12.8	
	Total Weighted Score (Assessment Sum)	24.356						27.190				12.8	
Tender D	Moderated Score	90	92	90	74	78	78	92	80	80	88	90	86.48 (Aggregate Total Weighted Scores)
	Weighted Score (Score x Sub Weighting)	7.2	7.36	9	5.92	3.12	1.56	14.720	14.4 Combined Method ((80+80) /2) X (0.12+0.06)		8.8	14.4	
	Total Weighted Score (Assessment Sum)	34.16						37.920				14.4	
Tender E	Moderated Score	42	44	46	38	44	45	38	41	38	36	60	43.57 (Aggregate Total Weighted Scores)
	Weighted Score (Score x Sub Weighting)	3.36	3.52	4.6	3.04	1.76	0.9	6.08	7.11 Combined Method ((41+38) /2) X (0.12+0.06)		3.6	9.6	



Defence
Infrastructure
Organisation

	Total Weighted Score (Assessment Sum)	17.18	16.790	9.6	
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Table 33: Worked Example: Collaboration Scores



66. EVALUATION WORKED EXAMPLE: WIN RESTRICTIONS

MEAT Scores	S&NI	Central	South East	South West
Tenderer 1	141,909,238	173,435,700	264,897,547	54,264,300
Tenderer 2	32,763,452	259,864,200	98,255,479	161,420,000
Tenderer 3	2,559,435	337,945,211	No Bid - Tenderer 3	No Bid - Tenderer 3
Tenderer 4	38,724	263,554,877	125,491,289	224,954,231
Tenderer 5	105,565,232	163,918,900	9,845,212	97,406,890
Tenderer 6	No Bid - Tenderer 6	No Bid - Tenderer 6	No Bid - Tenderer 6	227,214,579

Key	
 	Best Score
 	Awarded to
 	Variable
 	Constraint
Red Font Warning	Equal MEAT score exists

Price (£M)	S&NI	Central	South East	South West
Tenderer 1	£ 879,541,238	£ 1,265,435,700	£ 1,089,897,547	£ 965,735,700
Tenderer 2	£ 1,005,076,548	£ 1,168,135,800	£ 989,994,521	£ 1,113,580,000
Tenderer 3	£ 1,267,999,435	£ 1,300,054,789		
Tenderer 4	£ 1,425,881,276	£ 1,678,945,123	£ 1,385,491,289	£ 1,567,954,231
Tenderer 5	£ 999,845,232	£ 1,050,931,100	£ 999,845,212	£ 1,075,593,110
Tenderer 6				£ 1,200,785,421

Award to	S&NI	Central	South East	South West
Tenderer 1	0	0	0	0
Tenderer 2	1	0	1	0
Tenderer 3	0	1	0	0
Tenderer 4	0	0	0	0
Tenderer 5	0	0	0	0
Tenderer 6	0	0	0	1
Awarded	1	1	1	1
Max Winner(s)	1	1	1	1

Contracts Awarded	Max Awarded
0 <=	2
2 <=	2
1 <=	2
0 <=	2
0 <=	2
1 <=	2

Quality Score:	Region 1	Region 2	Region 3	Region 4
LQ Tenderer 1	46.10	52.00	55.00	60.00
Mid Tenderer 2	64.87	68.00	72.55	75.00
Mid-HQ Tenderer 3	79.09	78.00		
HQ Tenderer 4	89.12	92.50	84.00	79.00
Mid Tenderer 5	55.89	57.85	66.00	69.00
HQ Tenderer 6				84.00

COPIS	£	16,000,000	£	21,000,000	£	15,000,000	£	17,000,000
-------	---	------------	---	------------	---	------------	---	------------

Contract Weighting	1	1	1	1	MEAT Total
Winning MEAT Score -	32,763,452	- 337,945,211	- 98,255,479	- 227,214,579	- 696,178,721



ANNEX E: INSURANCE EVALUATION

**Insurance Requirements Table 34 –
Call of Schedule 11 Insurance
Requirements Built Estate**

RESPONSE GUIDANCE: The Tenderer must evidence how the Tenderer will meet the minimum insurance requirements by fully completing the Insurance Requirements Table 34 below:

Class of insurance	Insurer(s) identity (including any excess layer insurers)	Schedule 11 (Insurance Requirements) proposed maximum deductible threshold		Agreement to the requirements of Schedule 11 (Insurance Requirements)	Agreement to the requirements of Schedule 11 (Insurance Requirements) Annex Required Insurances
Contractors “All Risks” Insurance					
Third Party Public and Products Liability Insurance					
Professional Indemnity Insurance					
Airside Third Party Liability Insurance					
Airside Motor Third Party Liability Insurance					



Statutory insurances (Employers Liability Insurance and Motor Third Party Liability Insurance)				
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Marking Scheme for insurer identity

The insurer or insurers proposed by the Tenderer against each class of insurance in the column headed “Insurer identity (including any excess layer insurers)” in the Insurance Requirements Table are considered by the Buyer based on its professional judgement to be a reputable insurer(s) of sufficient standing for the class of insurance and the location of the services in question taking into consideration matters including, but not limited to, ownership, management, operating environment, reinsurance protection, lines of business, profitability and business philosophy (a “Reputable Insurer”). This will be evaluated on a **Pass/Fail** basis and the insurer proposed by the Tenderer in the Insurance Requirements Table for each category of insurance must be a Reputable Insurer to constitute a Pass.

Tenderer Proposed Maximum Deductible Threshold

The maximum deductible threshold proposed by the Tenderer for each and every occurrence for each class of insurance in the column headed “Proposed maximum deductible threshold” of the Insurance Requirements Table is considered by the Buyer based on its the professional judgement to be reasonable in the insurance market prevailing at the point of the submission by the Tenderer of its response (a “Reasonable Maximum Deductible Threshold”). This will be evaluated on a **Pass/Fail** basis and each proposed maximum deductible threshold must be a Reasonable Maximum Deductible Threshold to constitute a Pass.

Amendments to Schedule 11 (Insurance Requirements)

Any amendments the Tenderer seeks to make to Schedule 11 other than the insertion of Reasonable Maximum Deductible Thresholds shall be assessed against the following criteria. The amendments will be assessed as a whole to determine the level of risk to the Buyer in accordance with the marking scheme set out below.

Marking scheme	Evaluation guidance
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Pass	No amendment to the Buyer minimum insurance requirement other than 'the insertion of Reasonable Maximum Deductible Thresholds into Schedule 11 of the contract.
Pass	Amendment to the Buyer minimum insurance requirement that is not considered to confer any adverse risk to the Buyer or any material diminution in the required insurance cover of the Buyer.
Fail	Amendment to the Buyer minimum insurance requirement that is considered to confer some appreciable risk to the Buyer or diminution in the required insurance cover of the Buyer.
Fail	Insufficient detail or is considered to leave gaps in the level or extent of insurance cover which exposes the Buyer to significant adverse risk or significantly material diminution in the required insurance cover of the Buyer.
Fail	Unmarked. The above table has not been completed in full or in the required format.



ANNEX F – Technical Evaluation Questions

A1 - Contract Mobilisation and Demobilisation

Aim:

The Buyer needs to be assured the mobilisation from one provider to another at the start and end of the FDIS contracts shall not impact upon the quality and provision of the service. The Supplier shall work collaboratively with the outgoing Supplier and stakeholders to meet the needs of the Buyer. The Supplier is required to set out its strategy and plans for mobilisation and exit from the contract in accordance with the SOR and the Call-Off Schedules for Mobilisation and Exit.

Evaluation Criteria:

How does the Tenderer intend to undertake mobilisation to minimise disruption to the delivery of services?

Tenderers shall answer question A1 by drawing upon the information in the following documents: Call-Off Schedule 7 (Key Staff), Call-Off Schedule 9 (Security), Call-Off Schedule 10 (Exit Management), Call-Off Schedule 13 (Mobilisation), Call-Off Schedule 15 (Contract Management), Call-Off Schedule 28 (Specification) Part 4 (Contract Mobilisation/Demobilisation), Call-Off Schedule Part 1 (General Information) and Call-Off Schedule 28 (Specification) Part 5 (Statutory and Mandatory Obligations).

Criteria are:

- a. Submission of a draft Mobilisation Plan to meet the obligation and requirements to facilitate delivery of the Services in accordance with Call-Off Schedule 13 and Call-Off Schedule 28 Part 4 to meet the Programme timelines.
- b. A draft Organisational Chart highlighting key staff, their position, responsibilities and appropriateness to manage the mobilisation and in place throughout the duration of the contract.
- c. The approach to ensuring how you will mobilise all necessary resources with particular note to ICT services, security clearance and staff to mobilise sufficient staff and supply chain companies to ensure the mobilisation of all services under the contract.
- d. Clear details of robust plans to review all Statutory and Mandatory requirements for execution of the contract during the mobilisation period.
- e. A description of your approach to ensure that all stakeholders shall work closely together to minimise service disruption and to maximise efficiencies during transition.
- f. Details of how you will manage rectification of a delay in mobilisation to ensure that the Services can be maintained.
- g. A submission that details your proposal to develop, manage and deliver training to all staff appointed to operate the Helpdesk and QMS to mobilise at ISD.



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h. Outline details of an Exit Plan recognising the complexities of exiting this contract while continuing to perform at the same level of quality for the transition period.



Aim:

The Buyer needs to be assured of the Supplier's ability to meet their relevant HR obligations as set out in the Transfer Regulations for the transfer of the affected employees throughout the transition period and the duration of the contract.

Evaluation Criteria:

How shall the Tenderer meet their HR obligations?

Tenderers shall answer question A2 by drawing upon the information in the following documents: Call-Off Schedule 2 (Staff Transfer).

Criteria are:

- a. A clear outline of how you intend to manage the people resourcing, skills and knowledge requirements where activities are transferring but there is no or insufficient corresponding staff transfer under the Transfer Regulations to ensure that the right resources, numbers and skills are in place from ISD to deliver services to the required standards.
- b. A submission that identifies and describes the key HR Transition business deliverables, including affecting the TUPE transfer, during the Transition Phase that will require HR management support activities.
- c. A description of how the HR activities will be managed and the timing of the HR activities in the context of the Transition Phase.
- d. Provide details, including any recruitment plans, of where you consider significant recruitment will be necessary; include locations, functions and how the recruitment will be undertaken.
- e. Details of plans (if any) you have which might result in the transfer of employment of Transferring Employees to any corporate entity and / or sub-contractor other than yourself. This shall include for each corporate entity and / or sub-contractor details of numbers, grades, job functions and location of posts.
- f. How you plan to induct Transferring Employees and new employees into your organisation and to induct all staff including existing employees into the service delivery model to ensure delivery of the Service
- g. How you will transfer staff to ensure a smooth transition of employment, providing details of what actions you will take, who will be involved and the timescales.
- h. A submission that details of the procedures you shall follow in the managing staff surplus and redundancy situations whether arising directly as a result of the transfer, or unrelated to the transfer itself.
- i. Identify any planned redundancy dismissals of employees of Economical, Technical or Organisational grounds to be implemented during or immediately (within the first 12 months) post the Transition Phase including identifying:



- (1) The timing/phasing of any anticipated redundancies;
- (2) The reason for the redundancies;
- (3) The number of redundancies;
- (4) The location of the staff affected;
- (5) The roles of the staff affected;
- (6) The composition of 'at risk' grouping of staff, e.g. transferring employees, existing employees;
- (7) How the dismissals will be decided upon, implemented and managed including detailing the proposed selection criteria; and
- (8) Compensation terms to be offered, including confirmation that for former Buyer transferred employee's redundancy compensation will be in line with the Civil Service Compensation Scheme policy, where they remained on transferred terms.
- (9) How legal and policy obligations will be met when managing and administering the redundancies detailed above, ensuring it is a fair and reasonable process and what involvement they envisage the Trades Unions and/or Employee Forums will have.



A3 - Maintenance Services – (Scotland & Northern Ireland)

Aim:

The Supplier shall be responsible for the delivery of three types of Maintenance Service; a Core Service and a Non-Core Service which includes a Planned Preventative Maintenance (PPM) Service to maintain the Estate in a safe, legal and operational condition in accordance with all UK Statutory and MOD Mandatory tests, inspections and servicing.

Evaluation Criteria:

How does the Tenderer intend to manage the delivery of all maintenance services across the Estate to maintain the Affected Property in a Compliant Condition?

Tenderers shall answer question A3 by drawing upon the information in the following documents: Call-Off Schedule 13 (Mobilisation), Call- Off Schedule 14 (Performance Management), Call-Off Schedule 17 (MOD Terms), Call-Off Schedule 28 (Specification) Part 6 Core Maintenance Services, Call-Off Schedule 28 (Specification) Part 6 – Annex A (SNI) and Call-Off Schedule 30 (Health and Safety).

Criteria are:

- a. The approach you shall have in place to manage Reactive Maintenance repairs in a single visit in accordance with the Performance Management Targets and the actions you shall take should you fail to complete the repair in a single visit (taking into account normal working hours and out of hours).
- b. The approach you shall have in place to record and deliver all the Core Planned Preventative Maintenance (PPM) services required under this contract in accordance with Call-Off Schedule 28 (Specification).
- c. Detail of your approach to manage the Non-core Planned Preventative Maintenance (PPM) services required under this contract on a Call-off basis as required by the Buyer in accordance with Call-Off Schedule 28 (Specification).
- d. Details of your approach and key resource you shall have in place within the PPM programme to operate and maintain an Establishment Specific Task Schedule (ESTS) on the CAFM System and how you shall ensure details are made available to the Buyer within the timelines stated in the Call-Off Schedule 29 (Specification).
- e. A submission that clearly details how you shall produce and maintain a Service Register, to cover all Establishments within the region, which is a rolling ten (10) year forward programme of Service and maintenance that is aligned to this requirement.
- f. An explanation of how your solution will achieve the delivery of low level reactive and remedial works (arising from inspections, tests and servicing, etc.) which impact the experience of the users of the Estate. This should include how you will deliver services (i.e. meeting local/regional needs) to ensure the response times in Call-Off Schedule 28 (Specification) Part 6 Maintenance Services are achieved in the most effective manner possible.
- g. Details of a process to undertake a Building Custodian role for Level 2 Assets with an Operational Need 5.



h. A submission that describes how you shall undertake the regional specific maintenance tasks, in the Establishment Specific Task Schedule (ESTS), identified in Call-Off Schedule 28, Part 6 – Annex A (SNI) Regional Specific Maintenance Services, Scotland and Northern Ireland, taking into account the geographical remoteness of establishments and establishment security requirements.



A3 - Maintenance Services (Central)

Aim:

The Supplier shall be responsible for the delivery of three types of Maintenance Service; a Core Service and a Non-Core Service which includes a Planned Preventative Maintenance (PPM) Service to maintain the Estate in a safe, legal and operational condition in accordance with all UK Statutory and MOD Mandatory tests, inspections and servicing.

Evaluation Criteria:

How does the Tenderer intend to manage the delivery of all maintenance services across the Estate to maintain the Affected Property in a Compliant Condition?

Tenderers shall answer question A3 by drawing upon the information in the following documents: Call-Off Schedule 13 (Mobilisation), Call- Off Schedule 14 (Performance Management), Call-Off Schedule 17 (MOD Terms), Call-Off Schedule 28 (Specification) Part 6 Core Maintenance Services, Call-Off Schedule 28 (Specification) Part 6 – Annex C (C) and Call-Off Schedule 30 (Health and Safety).

Criteria are:

- a. The approach you shall have in place to manage Reactive Maintenance repairs in a single visit in accordance with the Performance Management Targets and the actions you shall take should you fail to complete the repair in a single visit (taking into account normal working hours and out of hours).
- b. The approach you shall have in place to record and deliver all the Core Planned Preventative Maintenance (PPM) services required under this contract in accordance with Call-Off Schedule 28 (Specification).
- c. Detail of your approach to manage the Non-core Planned Preventative Maintenance (PPM) services required under this contract on a Call-off basis as required by the Buyer in accordance with Call-Off Schedule 28 (Specification).
- d. Details of your approach and key resource you shall have in place within the PPM programme to operate and maintain an Establishment Specific Task Schedule (ESTS) on the CAFM System and how you shall ensure details are made available to the Buyer within the timelines stated in the Call-Off Schedule 29 (Specification).
- e. A submission that clearly details how you shall produce and maintain a Service Register, to cover all Establishments within the region, which is a rolling ten (10) year forward programme of Service and maintenance that is aligned to this requirement.
- f. An explanation of how your solution will achieve the delivery of low level reactive and remedial works (arising from inspections, tests and servicing, etc.) which impact the experience of the users of the Estate. This should include how you will deliver services (i.e. meeting local/regional needs) to ensure the response times in Call-Off Schedule 28 (Specification) Part 6 Maintenance Services are achieved in the most effective manner possible.
- g. Details of a process to undertake a Building Custodian role for Level 2 Assets with an Operational Need 5.



h. A submission that describes how you shall undertake the regional specific maintenance tasks, in the Establishment Specific Task Schedule (ESTS), identified in Call-Off Schedule 28, Part 6 – Annex C (C) Regional Specific Maintenance Services, Central, taking into account the geographical size and number of specialist establishments.



A3 - Maintenance Services (South East)

Aim:

The Supplier shall be responsible for the delivery of three types of Maintenance Service; a Core Service and a Non-Core Service which includes a Planned Preventative Maintenance (PPM) Service to maintain the Estate in a safe, legal and operational condition in accordance with all UK Statutory and MOD Mandatory tests, inspections and servicing.

Evaluation Criteria:

How does the Tenderer intend to manage the delivery of all maintenance services across the Estate to maintain the Affected Property in a Compliant Condition?

Tenderers shall answer question A3 by drawing upon the information in the following documents: Call-Off Schedule 13 (Mobilisation), Call- Off Schedule 14 (Performance Management), Call-Off Schedule 17 (MOD Terms), Call-Off Schedule 28 (Specification) Part 6 Core Maintenance Services, Call-Off Schedule 28 (Specification) Part 6 – Annex B (SE) and Call-Off Schedule 30 (Health and Safety).

Criteria are:

- a. The approach you shall have in place to manage Reactive Maintenance repairs in a single visit in accordance with the Performance Management Targets and the actions you shall take should you fail to complete the repair in a single visit (taking into account normal working hours and out of hours).
- b. The approach you shall have in place to record and deliver all the Core Planned Preventative Maintenance (PPM) services required under this contract in accordance with Call-Off Schedule 28 (Specification).
- c. Detail of your approach to manage the Non-core Planned Preventative Maintenance (PPM) services required under this contract on a Call-off basis as required by the Buyer in accordance with Call-Off Schedule 28 (Specification).
- d. Details of your approach and key resource you shall have in place within the PPM programme to operate and maintain an Establishment Specific Task Schedule (ESTS) on the CAFM System and how you shall ensure details are made available to the Buyer within the timelines stated in the Call-Off Schedule 29 (Specification).
- e. A submission that clearly details how you shall produce and maintain a Service Register, to cover all Establishments within the region, which is a rolling ten (10) year forward programme of Service and maintenance that is aligned to this requirement.
- f. An explanation of how your solution will achieve the delivery of low level reactive and remedial works (arising from inspections, tests and servicing, etc.) which impact the experience of the users of the Estate. This should include how you will deliver services (i.e. meeting local/regional needs) to ensure the response times in Call-Off Schedule 28 (Specification) Part 6 Maintenance Services are achieved in the most effective manner possible.
- g. Details of a process to undertake a Building Custodian role for Level 2 Assets with an Operational Need 5.



h. A submission that describes how you shall undertake the regional specific maintenance tasks, in the Establishment Specific Task Schedule (ESTS), identified in Call-Off Schedule 28, Part 6 – Annex B (SE) Regional Specific Maintenance Services, South East, taking into account operational requirements, profile of the establishments and an understanding of other electrical codes.



A3 - Maintenance Services (South West)

Aim:

The Supplier shall be responsible for the delivery of three types of Maintenance Service; a Core Service and a Non-Core Service which includes a Planned Preventative Maintenance (PPM) Service to maintain the Estate in a safe, legal and operational condition in accordance with all UK Statutory and MOD Mandatory tests, inspections and servicing.

Evaluation Criteria:

How does the Tenderer intend to manage the delivery of all maintenance services across the Estate to maintain the Affected Property in a Compliant Condition?

Tenderers shall answer question A3 by drawing upon the information in the following documents: Call-Off Schedule 13 (Mobilisation), Call- Off Schedule 14 (Performance Management), Call-Off Schedule 17 (MOD Terms), Call-Off Schedule 28 (Specification) Part 6 Core Maintenance Services, Call-Off Schedule 28 (Specification) Part 6 – Annex D (SW), Call-Off Schedule 28 (Specification) Part 6 – Annex E (Dstl) and Call-Off Schedule 30 (Health and Safety).

Criteria are:

- a. The approach you shall have in place to manage Reactive Maintenance repairs in a single visit in accordance with the Performance Management Targets and the actions you shall take should you fail to complete the repair in a single visit (taking into account normal working hours and out of hours).
- b. The approach you shall have in place to record and deliver all the Core Planned Preventative Maintenance (PPM) services required under this contract in accordance with Call-Off Schedule 28 (Specification).
- c. Detail of your approach to manage the Non-core Planned Preventative Maintenance (PPM) services required under this contract on a Call-off basis as required by the Buyer in accordance with Call-Off Schedule 28 (Specification).
- d. Details of your approach and key resource you shall have in place within the PPM programme to operate and maintain an Establishment Specific Task Schedule (ESTS) on the CAFM System and how you shall ensure details are made available to the Buyer within the timelines stated in the Call-Off Schedule 29 (Specification).
- e. A submission that clearly details how you shall produce and maintain a Service Register, to cover all Establishments within the region, which is a rolling ten (10) year forward programme of Service and maintenance that is aligned to this requirement.
- f. An explanation of how your solution will achieve the delivery of low level reactive and remedial works (arising from inspections, tests and servicing, etc.) which impact the experience of the users of the Estate. This should include how you will deliver services (i.e. meeting local/regional needs) to ensure the response times in Call-Off Schedule 28 (Specification) Part 6 Maintenance Services are achieved in the most effective manner possible.



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g. Details of a process to undertake a Building Custodian role for Level 2 Assets with an Operational Need 5.

h. A submission that describes how you shall undertake the regional specific maintenance tasks, in the Establishment Specific Task Schedule (ESTS), identified in Call-Off Schedule 28, Part 6 – Annex D (SW) and Annex E (Dstl) Regional Specific Maintenance Services, South West, taking into account the geographical area and operational requirements at the specified establishments;



A4 – Billable Works Services

Aim:

The Supplier shall be responsible for the development of robust Billable Work Services processes as required under the contract while ensuring continued delivery of the core service.

Evaluation Criteria:

The effective planning, reporting and delivery of Billable Work Services (BWS) to the agreed Performance/Quality, Cost and Time envelope is extremely important to the Buyer and military customer. How does the Tenderer intend to provide processes that support delivery of programmed BWS and in year change requirements?

Tenderers shall answer question A4 by drawing upon the information in the following documents: Joint Schedule 12 (Supply Chain), Call-Off Schedule 4a (Billable Works), Call-Off Schedule 14 (Performance Management), Call-Off Schedule 15 (Contract Management), Call-Off Schedule 28 (Specification) Part 11 Billable Works, Call-Off Schedule 28 (Specification) Part 12 Non-Core Services and PPM, and Practitioner Guide EM/02 Estate Management.

Criteria are:

- a. A submission that describes a detailed understanding of the processes that you will use to plan, manage and deliver across each Billable Works value band, recognising the distinction and differing approaches required for high volume low value / low volume high value activity.
- b. A credible approach to how you will build the Buyers trust, and demonstrate value for money, in order to reduce the level of audit and scrutiny that is required to operate Billable Works, rapidly, effectively and efficiently, in particularly to Call-Off Schedule 14 (Performance Management), Call-Off Schedule 15 (Contract Management) and Practitioner Guide EM/02 Estate Management Assurance Regime.
- c. A submission that describes how you will provide a flexible and responsive service to meet the fluctuating Billable Works demand, including but not limited to:
 - how you will appoint and maintain access to the right Suitably Qualified and Experienced Personnel, including local SMEs;
 - how you will structure your services to ensure effective delivery, including across the boundaries of Core, Non-Core and Billable Works Deliverables;
 - what commercial arrangements (such as enabling frameworks and other competitions) may be used to ensure access to the necessary expertise to deliver the Billable Works in a timely way.
- d. A submission that describes in detail your approach to collaboration with the Buyer to support annual planning processes and unexpected in year change / variations to the agreed programme.
- e. A submission that describes in detail how you will bring innovation to both Billable Works programme development and the packaging of critical infrastructure programmes which support the Buyer's infrastructure / estate stewardship advisory role.



A5 – Helpdesk

Aim:

The Supplier shall provide through its Helpdesk the first point of contact to respond to Hard Facilities Management Service Requests including, but not limited to, fault reporting, twenty-four (24) hours per day three hundred and sixty-five (365) days per year.

Evaluation Criteria:

How will the Tenderer provide, operate and maintain a Hard Facilities Management (HFM) Helpdesk service that is linked to the CAFM System, to meet the Buyer requirements?

Tenderers shall answer question A5 by drawing upon the information in the following documents: Call-Off Schedule 28 (Specification) Part 2 Helpdesk and Call-Off Schedule 28 (Specification) Part 6 Core Maintenance Services.

Criteria are:

- a. A comprehensive outline of how the Helpdesk will liaise and communicate effectively with other Buyer Suppliers and stakeholders; including adoption of industry best practice, sharing up to date processes and emergency contact information.
- b. A draft Decision Tree question set for a Service Request to meet the requirement set out for this service in the SOR, ensuring linkage to previously closed requests.
- c. A submission that demonstrates accurately how you will ensure integration with the CAFM system and with the Buyers proposed IM systems.
- d. A comprehensive description of your Complaints Management System including the process and handling, operation within performance parameters and the escalation process.
- e. Clear precise Job descriptions and skills profiles for key Helpdesk posts.
- f. Detailed plans of your Helpdesk training programme and documented training that shall ensure all staff are fully trained and security cleared ready to mobilise at ISD.



A6 – Health and Safety Management

Aim:

The Supplier shall share responsibility for the achievement, assurance and management of Health and Safety throughout their organisation and supply chain to undertake the activities required throughout the contract duration. The Supplier and all its sub-contractors shall be competent to undertake the activities required under the Contract and shall comply with all relevant Health and Safety legislation.

Evaluation Criteria:

Tenderers shall answer this question A6 by drawing upon the information in the following documents: Call-Off Schedule 30 (Health and Safety), and Call-Off Schedule 31 (Contractor Premises).

Criteria are:

a. A submission that demonstrates how you will ensure your Safety Policy statement and Safety Management System are appropriate and provide compliance with:

- (1) Health and Safety legislation both UK and National Variations;
- (2) ACOPs;
- (3) MOD Policy Instructions, Standards, Practitioner Guides;
- (4) MOD Joint Service Publications (JSP), in particular, including but not limited to JSP 375, MOD Gas Safety Case and supporting documentation;
- (5) Establishment Health and Safety Policies;
- (6) Service Delivery Practitioners Guide Estate Management EM/02 - Estate Management Assurance Regime are appropriate.

b. A submission that demonstrates how you will ensure alignment of your H&S and Environmental Management System (SHEMS) to the Buyer's system.

c. A submission that demonstrates how you will manage and comply with the following areas throughout the contract:

- (1) Legionella and water hygiene, including details of your emergency arrangements that would be implemented following a major legionella incident;
- (2) Asbestos, including details of your emergency arrangements to support the Buyer following a major asbestos incident;
- (3) High-risk activities on the Estate and that sufficient resource will be in place to support safe systems of work;
- (4) How you will comply with CDM Regulations and DIO Policy Instruction 005 2019.



d. A submission that demonstrates how you will ensure you maintain sufficient roles throughout the duration of the contract:

- (1) Co-ordinating Authorising Engineers (CAE);
- (2) Authorising Engineers (AE);
- (3) Appointed Persons (AP);
- (4) Contract SHEF Manager;
- (5) Principal Contractor;
- (6) Principal Designer.

e. A submission which demonstrates how you will ensure your staff and supply chains will:

- (1) Work to the Statement of Known Hazards system as defined in Schedule 30, and JSP 375 Part 2 Volume 1 Chapter 33;
- (2) Integrate with the operation of a MOD or military establishment and associated rules and procedures;
- (3) Implement MOD's 4C's system and complying with establishment emergency plans and orders.

f. A submission that demonstrates how you will engage with the Buyer, in any communication from regulatory authorities (i.e. HSE, HSE NI, Environment Agency, Defence Safety Authority, etc), regarding site visits including any outcome/enforcement activity to your staff/subcontractors.

g. A submission that demonstrates how you will manage, implement and comply with Buyers Safety Alerts, Technical Instructions, Notices and Bulletins.

h. A submission that demonstrates how you will ensure that all necessary H&S training and culture is maintained across all staff and Subcontractors.

i. A submission that demonstrates how the you will ensure timely reporting and investigation of Accidents Incidents, Near Misses and Dangerous Occurrences.

j. A submission that demonstrates how you will operate and maintain MOD Gas infrastructure including Networks and implement the MOD Exemplar Gas Safety Case.



B1 - Management of Sub-Contractors and Supply Chain

Aim:

The Supplier shall manage sub-contractors and the supply chain to ensure continued delivery of the Service required by the Buyer throughout the life of the Contract.

Evaluation Criteria:

How does the Tenderer intend to select and manage their sub-contractors and the supply chain to provide Services that shall meet and maintain the quality standard of the Buyer's requirements?

Tenderers shall answer question B1 by drawing upon the information in the following documents: Joint Schedule 12 (Supply Chain), Call-Off Schedule 15 (Contract Management), Call-Off Schedule 14 (Performance Management), Call-Off Schedule 28 (Specification) Part 1 General Information and Call-Off Schedule 28 (Specification) Part 4 Contract Mobilisation/Demobilisation.

Criteria are:

- a. Details of the process in place to identify and select sub-contractors from within the supply chain including but not limited to flexible pricing models, flow down of conditions of contract and efficient delivery of Services.
- b. How you intend to ensure and provide confidence to the Buyer that sub-contractors have both the capacity and capability to provide Services to the required standard in accordance with the Buyer requirement set out in Call-Off Schedule 28 (Specification).
- c. Details of robust processes in place for auditing and inspecting the sub-contractors work ensuring compliance with contractual requirements on Quality, Health and Safety, environmental and legislative requirements, and at all times optimising the achievement of value for money.
- d. A detailed description of your approach to risk management and contingency planning and how this will improve delivery.
- e. How you will identify and implement improvements in the quality and operational efficiency within the supply chain, whilst providing continuity of supply throughout the life of the contract.



B2 - Contract Management

Aim:

The importance and benefits of effective Contract Management are essential to the success of the Contract. The Supplier shall be proactive in monitoring, control and management of all activities necessary to ensure the delivery of all Services required by the Buyer.

Evaluation Criteria:

How will the Tenderer ensure it will effectively manage the contract?

Tenderers shall answer question B2 by drawing upon the information in the following documents: Joint Schedule 6 (Key Sub-Contractors), Joint Schedule 12 (Supply Chain), Call-Off Schedule 1 (Transparency Reports), Call-Off Schedule 3 (Continuous Improvement), Call-Off Schedule 8 Business Continuity and Disaster Recovery, Call-Off Schedule 14 (Performance Management), Call-Off Schedule 15 (Contract Management), Call-Off Schedule 17 (MOD Terms), Call-Off Schedule 24 (Collaboration), Call-Off Schedule 28 (Specification) Part 1 General Information, Call-Off Schedule 28 (Specification) Part 10 Core Miscellaneous Services and Call-Off Schedule 32 (Risk Management).

Criteria are:

- a. A submission that demonstrates how you will proactively identify risks, issues, and potential or actual failures in the quality of the Services and mitigate and resolve them.
- b. A submission that describes how your operating model will manage, adapt and assess the impact of change in response to changing circumstances in the size and shape of the estate ensuring continued delivery of Services.
- c. A credible and robust draft Business Continuity and Disaster Recovery Plan (BCDR), which sets out the arrangements to be invoked to ensure continuity of the business operations to deliver the provision of the Services and return Services back to full functionality in all circumstances.
- d. A credible and innovative draft Continuous Improvement Plan, which identifies clear measures, ideas and processes to effectively deliver continuous improvement in the provision of the Services over the life of the contract.
- e. An explanation of how you shall comply with the Buyer's List of Transparency Reports to achieve compliancy. This shall become an Annex to Call-Off Schedule 1 Transparency Reports.
- f. A submission that demonstrates how you will apply your and your supply chain's, Quality Management System (QMS), and integrate it with the Buyer's QMS in the delivery of this contract.
- g. A submission that demonstrates how you will implement, with the Buyer, a culture that facilitates Quality Management and Continuous Improvement.
- h. A submission that demonstrates how, through the application of the processes described in the contract, you will proactively measure and manage performance, and report to the Buyer instances of non-performance, at all levels of the contract, to ensure



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that the service is delivered to the agreed standard.

- i. A credible and robust draft Joint Relationship Management Plan (JRMP) which sets out the arrangements to manage the relationship between the Buyer and Supplier during the Contract.
- j. A submission that demonstrates how you will identify and manage stakeholders at all levels of contract delivery and ensure that messaging and communication is consistent and reflective of the jointly agreed approach to managing the contract.
- k. A submission that describes how you will support the Buyer to provide personal development and work experience to military trade persons that work at the locations specified in Call-Off Schedule 28 Part 10 Core Miscellaneous Services; including graduate secondment.



C1 - Asset Management.

Aim:

The Supplier shall demonstrate how they will support the Buyer's Asset Management Programme to deliver a more mature asset management system and achieve a compliant ISO 55000 management system.

Evaluation Criteria:

How will the Tenderer contribute to the Buyer's understanding of asset condition and how they will work with the Buyer to develop insights and actions to improve asset condition.

Tenderers shall answer C1 by drawing upon the information in the following documents: Call-Off Schedule 28 SOR Part 1 General Information, Call-Off Schedule 28 SOR Part 6 Core Maintenance Services and Asset Management Programme Project Initiation Document (VDR.)

Criteria are:

- a. A submission that demonstrates a detailed understanding of the factors that impact lifecycle costs (Level 0 to Level 4 assets) and how you shall provide this data and insights to the Buyer. This should also take account of the need to provide forecasts and trend analysis.
- b. An explanation of how you will support the measurement and automation of asset management and means to deliver greater asset performance (including the adoption of industry best practice).
- c. Details of how you identify, categorise, score and report asset risk in a way that is collated at different levels in the asset/organisation hierarchy.
- d. A submission that demonstrates how you will support the Buyer in moving all data and information into a standardised asset information architecture (including CoBie, Uniclass and SPEC024).
- e. Your proposal to support and deliver improvements in the completeness, accuracy, validity and timeliness of all asset information.
- f. A proposal that demonstrates how you shall implement and adopt BIM requirements ensuring processes, technologies and systems meet the Governments targets in accordance with the Buyer's EIR.
- g. A submission that describes how your tools, models and systems will develop over the life of the Contract and maintain alignment to ISO 55000.
- h. A submission that proposes how you will routinely identify and pilot innovations aligned to ISO 55000.



D1 –Social Value and Sustainability

Aim:

The Supplier shall be responsible for sustainable management, environmental management and identifying how the provision of services shall improve the economic, social and environmental wellbeing of both service personnel and the wider community.

Evaluation Criteria:

How does the Tenderer intend to meet the Buyer's objective to protect the environment when undertaking the activities required by the contract and meet The Public Services (Social Value) Act 2012 legal obligation on the public sector to secure Social Value in Contracts?

Tenderers shall answer question D1 by drawing upon the information in the following documents: Call-Off Schedule 28 (Specification) Part 7 Support Services and Call-Off Schedule 28 (Specification) Part 9 Sustainable Development and Environmental Management.

Criteria are:

- a. An explanation of how you deliver the Services to ISO 20400 ensuring sustainability risk is identified and mitigated through the supply chain.
- b. Details of your Environmental Management System (EMS) for all Services that meet ISO 14001:2015 and how it shall cover all operations executed under Contract.
- c. Clear demonstration of your approach to Sustainability Appraisals and Environmental Assessments for Services in scope of this requirement.
- d. Details of your Waste Management Strategy approach to producing site specific waste management plans to incorporate waste reduction, waste minimisation and recycling policies that will be compliant with regulatory and legislative requirements and comply with waste hierarchy.
- e. How you intend to provide, operate and maintain a centralised Utilities Management Bureau Service that reports to the Buyer's utilities team to support the MOD objectives regarding energy consumption, carbon emissions and water consumption.
- f. A description of how you will ensure a diverse supply chain that is accessible to all types of businesses; anticipating drawing down on services from the local community and including where SMEs can support the Buyer in achieving a 25% spend on SMEs and the potential value for money solutions that may be offered by SMEs i.e. innovative new technologies.
- g. A description of how your organisation will perform the contract to ensure staff mental health is promoted and how you will monitor and measure this.
- h. A description of how your organisation will encourage the increase in apprenticeships and how you will monitor and measure this.



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i. A description of how your organisation will encourage community engagement and how you will monitor and measure this.



ANNEX G: Virtual Data Room Contents

Type of Data	Description
Guidance Notes	Information that will assist the Tenderers in navigating around the data room and detail of the content of data held.
Region Map	A map that identifies the location of the all the Establishments in the Region.
Reference Documents	Electronic copies of Reference Information that supports the Estate Information and Statement of Requirement, such as JSPs, Hard FM Standards & Tasks that are not in the public domain.
Heritage Assets & Sites	List of Scheduled Monuments and the condition. Spatial data that identifies any statutory Heritage destinations, World Heritage Sites and Conservation Areas.
<i>Statutory</i> Designated Areas (previously SSSIs)	List of areas that identify where there are any MOD owns SSSI (Sites of Special Scientific Interest) or Designated Areas.
Help Desk Reports	Historic volumetric data to enable the tenderers to understand the numbers of customer contacts handled by the helpdesk. The overall volumetric data will be broken down by type number of calls and other types of correspondence per region and the response rates.
Schedule of TUPE Information	Not in the data room, but provided separately.
Exit Strategies	Copies of the current incumbent Exit Strategies
Environmental Management Systems	A management system which provides a framework enabling a business to identify, monitor and control its significant environmental aspects. An EMS addresses environmental risks and prioritises the actions necessary to achieve best-practice in environmental management. It also acts as a 'control mechanism' to ensure legal compliance with environmental legislation.
Level 2 Asset Data	Asset list of Level 2 built assets defined by Spec 024 from IMS, that are to be maintained during the period of the contract, includes usage code, floor area, construction code, roof type and number of storeys. The Asset List will contain planning factors. It will also identify if an asset is built, infrastructure or maritime.
Level 3 & 4 Data	List of level 3 and 4 asset data attributed to the parent Level 2 Asset; NB - this data is provided for information purposes only.
Historic Work Orders	Number of all works carried out during the contract for each of the last three financial years. Contains the task category, such as response maintenance, Life Cycle Replacement, Additional Works Service, Low Value Works, Condition Improvements, etc.
Facility Condition Assessments	Latest FCM data that is linked to Level 2 Assets.



	The MOD SFG20 Maintenance Schedules
Site Plan	A site plan of the establishment where relevant.
Establishment Map	A drawing that identifies the boundary of each Establishment.
Grounds Maintenance Plan	<p>The GM drawing for each establishment should show the full extent of grounds to be maintained, and the differing maintenance requirements applicable to different areas of the establishment.</p> <p>Where the contractor is needed to provide any snow and ice clearance, It is to show the establishment's first priority and, if applicable, second and third priority access/egress routes for clearance.</p>
Local Constraints	Any information that can be provided on any constraints to the site or the surrounding areas, including: Security Constraints and Operational Constraints (eg Camp & Range Standing Orders).
Site Hazards	Where applicable for an establishment, a Hazard Register containing a list of the significant potential hazards arising from the Buyers operations and those of other contractors employed by MOD, e.g. military flying; explosives storage processing and handling; storage of flammable or corrosive materials; radiation; guard dogs; live firing; vehicle movements; marching troops; noise; lasers; heat; confined spaces; pressure systems. There should be some indication of the extent of the hazards, e.g. list of buildings where the hazard is present or the types of buildings where it occurs, or the parts of the site where the hazard is present.
Current Cyclical Maintenance Plan (ESTS)	Pre-planned inspection and maintenance tasks currently being carried out on each Level 2 asset such as (a) Statutory tasks, (b) MOD Mandatory (Regulatory Authority) tasks, (c) MOD Mandatory (Additional to Statutory or Regulatory Authority) tasks and any non-Mandatory tasks.
Permits	Numbers of Permits to Work issued per year for each safety discipline at each establishment.
Portable Appliance Testing Regime	Description of PAT regime in force at the establishment. The return should make clear who carries out the PAT.
Radon Data	Any data on radon concentrations within buildings and any measures to reduce radon gas concentrations.
Additional Establishment Data	<p>Data to be collected on any other aspect of existing service delivery, including interfaces, at a particular establishment which the Delivery Area identifies as having an impact on pricing of contracts.</p> <p>Interfaces with other contractors, other than the standard national ones of Aquatrine, BT, ATLAS : examples- , customer-appointed equipment maintainers, PFIs.</p>
Curated Data	A spreadsheet that indicates the type of curated data available and relevant to each establishment. Actual data to be provided at mobilisation.



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Asbestos Management Plans	PDF Asbestos Action Plan and Asbestos Register (in Excel) for all establishments.
Legionella Management Plans	PDF Management Plan and examples of Risk Assessments on assets where Legionella is present.
Gas Safety Management Plans	Copy of current Gas Safety Management plan for the establishment
Service Register (FASP)	The Service Register that includes funded and unfunded works that can be filtered to each Level 2 Asset.
Contractor's Accommodation	<p>Accommodation currently available to the Contractor(s) delivering the services covered in FDIS contract.</p> <p>Schematics provided of offices where accommodation is available. Where there are no schematics available a map of the site will be provided that highlight buildings that provide accommodation or SME accommodation and compounds.</p>
Out of Hours Attendance Requirements	Details of out of hours requirement where relevant to an establishment.
Encroachments	<p>A list of the assets where there is authorisation for temporary use of a regular and continuous basis of MoD land or buildings.</p> <p>The authorised temporary use of irreducible spare capacity in public-funded Employer land and buildings (i.e. that which is inalienable or incapable of being let commercially) by off-duty Service Personnel, Employer civilian employees and their respective dependants for recognised recreational, sport or welfare activities beyond agreed service scales in accordance with JSP 362 Chapter 14. Includes any encroachments/leased assets that receive statutory and mandatory and/or reactive maintenance under the contract.</p>
Buyer Provided Government Furnished Equipment	List of specialist equipment provided by the Buyer also known as Government Furnished Assets or Equipment (GFE) or issued property. Where applicable will include plant and catering equipment.
Asset Reports	Copies of the most recent technical inspections, professional appraisals or specialist inspections carried out during the current contract. This data requirement is only for reports pertaining to the Level 2 asset as a whole, not reports on its Level 3 or 4 components. Hence it is limited generally to technical inspections and professional appraisals of buildings or infrastructure.



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ANNEX H: TUPE DATA

The Buyer will provide the TUPE data through the AWARD tool. The password will be sent to Tenderers point of contact email address.



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ANNEX I: DEFFORM 28

Not to be used for General
Correspondence with the
Ministry

Affix

Stamp

Here

THE TENDER BOARD

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Tender No: 700003955

Date: 2 March 2020

Time: 10:00

DEFFORM 28

Edn 6/17

