

# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of Natural Environment  
Research Council (NERC)**

**Subject: Purchase & Part Exchange of 3 Forklifts**

**Sourcing reference number: PS17109**

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

Registered in England and Wales as a limited company. Company Number 6330639.  
Registered Office Polaris House, North Star Avenue, Swindon, Wiltshire SN2 1FF  
VAT registration GB618 3673 25  
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**UKSBS**  
*Shared Business Services*

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# Section 1 – About UK Shared Business Services

## Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our customers improve efficiency, generate savings and modernise.

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

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

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

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

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

## Our Customers

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

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

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

## Section 2 – About Our Customer

### Natural Environment Research Council (NERC)

NERC is the UK's main agency for funding and managing research, training and knowledge exchange in the environmental sciences.

NERC's work covers the full range of atmospheric, Earth, biological, terrestrial and aquatic science, from the deep oceans to the upper atmosphere and from the poles to the equator.

The organisation coordinates some of the world's most exciting research projects, tackling major issues such as climate change, environmental influences on human health, the genetic make-up of life on Earth, and much more.

Working internationally, NERC have bases at some of the most hostile places on the planet; running a fleet of research ships and aircraft and investing in satellite technology to monitor gradual environmental change on a global scale. NERC provide forewarning of, and solutions to, the key environmental challenges facing society.

#### **Examples of funded research**

- Showing the importance of mature tropical forests to the global climate.
- Developing a safer and cleaner way to mine gold by reducing the use of mercury.
- Studying the hole in the ozone layer - discovered by our British Antarctic Survey - and monitoring climate change.
- Playing a major role in the International Census of Marine Life that monitors our oceans.

#### **NERC also runs six organisations of world renown:**

- British Antarctic Survey, in Cambridge.
- British Geological Survey, in Nottingham.
- National Oceanography Centre, in Southampton.
- Centre for Ecology & Hydrology, in Oxfordshire.
- National Centre for Atmospheric Science, in Leeds.
- National Centre for Earth Observation, Swindon.

## Section 3 - Working with UK Shared Business Services Ltd.

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

| Section 3 – Contact details |   |  |
|-----------------------------|---|--|
| 3.1                         | Customer Name and address                             | Natural Environment Research Council<br>Polaris House<br>North Star Avenue<br>Swindon<br>SN2 1EU   |
| 3.2                         | Buyer name  | Owen Lister  |
| 3.3                         | Buyer contact details                                 | <a href="mailto:ProfessionalServices@uksbs.co.uk">ProfessionalServices@uksbs.co.uk</a><br>01793 425 085  |
| 3.4                         | Estimated value of the Opportunity                    | £62,500 (ex. VAT Maximum)  |
| 3.5                         | Process for the submission of clarifications and Bids | <b>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <a href="#">here</a>. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b> |

| Section 3 - Timescales |  |                                |
|------------------------|--|--------------------------------|
| 3.6                    | Date of Issue of Contract Advert and location of original Advert   | 30/08/2017<br>Contracts Finder |
| 3.7                    | Latest date/time ITQ clarification questions should be received through Emptoris messaging system                | 07/09/2017<br>11.00            |
| 3.8                    | Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris | 08/09/2017<br>14.00            |
| 3.9                    | Latest date/time ITQ Bid shall be submitted through Emptoris   | 15/09/2017<br>14.00            |
| 3.10                   | Date Bidders should be available if face to face clarifications are required                                     | N/A                            |
| 3.11                   | Anticipated rejection of unsuccessful Bids date  | 21/09/2017                     |

|      |                                 |            |
|------|---------------------------------|------------|
| 3.12 | Anticipated Award date          | 25/09/2017 |
| 3.13 | Anticipated Contract Start date | 01/10/2017 |
| 3.14 | Anticipated Contract End date   | 30/09/2020 |
| 3.15 | Bid Validity Period             | 60 Days    |

## Section 4 – Specification

### Executive Summary

Logistics Technical Group provide all Logistics provisions including Warehousing, Receipt and Dispatch, Customs Advice, Freight, and Specialist Lifting and Movements. In order to deliver a full range of services it runs a fleet of various Lifting Appliances ranging from Mobile Cranes too various Fork Lift Trucks (FLT).

### Critical Criteria

It is essential that the following points are considered as critical criteria and the ability in not satisfy any of these will render any tender as unsatisfactory:

- The three replacement vehicles are new construction.
- Part exchange value to be taken off total price prior to purchase.
- Supplier is to ensure that the lift capacity for each fork lift is met after any additional factors have been included.
- Engine Conformity to latest EU Directives for Emissions.
- Must meet all technical specification requirements.
- Parts and labour of warranty (minimum 36 months)
- Pneumatic Tyres due to operating surface uneven construction to be supplied, however can be exchanged for solid tyres if excessive damage incurs to pneumatic due to terrain and husbandry of facility.

### Current Vehicles for Part Exchange

Of this Fleet there are three Gas Powered FLT used for all external movements, currently comprising of:

- **Komatsu 2.54 Tonne Triplex Mast**  
*Manufactured: 1991*  
*Running Hours: 6313*  
*Tyre Type: Solid tyres*  
*Lift height: 4.3M*



- **Nissan 2.5 Tonne Triplex Mast**  
*Manufactured: Unknown*  
*Running Hours: 1485*  
*Tyre Type: Solid Tyres*  
*Lift Height: 5.1M*  
*Other: Side Shift*



- **Hyster 5 Tonne Triplex Mast**  
*Manufactured: 1997*  
*Running Hours: 4399*  
*Tyre Type: Solid tyres*  
*Lift height: 3.45M*  
*Other: Side Shift*



It is the intention to replace these vehicles with new more efficient models with the intention of incorporating part exchanging the existing trucks rather than conduct a separate evolution for their resale.

## Technical Specification

### Overview

Purchase 3 new construction forklifts to replace current aging trucks. To enable specific requirements the three trucks will be identified as below:

- T1 2.5 Tonnes
- T2 2.5 Tonnes
- T3 5 Tonnes

### Environment

These vehicles will spend 95% of their working life outside with in a quayside and yard, therefore will be subjected to varying environmental conditions with increased salt content. With these factors the vehicles must be constructed to standard where when incorporated with a routine husbandry schedule will not suffer adverse deterioration of components.

### ***Engine Requirements***

- Diesel or Gas to meet EU Regulations
- Diesel Engine is to meet EU regulations without the need to periodically burn off carbon deposits as a routine maintenance activity.
- LPG fuelled vehicles gas must be compatible with standard 18KG LPG bottles
- Engine power must be sufficient to enable efficient operation of trucks during full range of operations.

### ***Operators Drive Enclosure***

- Full Metal enclosure (Glass Screens and door panes)
- Suspension seating
- Mirrors
- Heater
- Wind screen wipers

### ***Lift Particulars***

T1 - 2.5 Tonnes at 500mm at full height

T2 - 2.5 Tonnes at 500mm at full height

T3 - 5 Tonnes at 500mm at full height

- 4.5M lift height
- Duplex Mast
- Integral side shift
- Tilt
- Minimum lift capacity of each truck

### ***Lights and warning systems***

- Full set of road legal lights
- Forward and rear facing spot lights
- Visual beacon when truck is operation
- Audible beacon when truck is reversing

**Note:** Confirmation from supplier that pneumatic tyres can be exchanged for solid tyres if excessive damage incurs to pneumatic due to terrain and husbandry of facility.

### ***Forks***

The following fork size are required:

- T1 1200mm
- T2 1200mm
- T3 1500mm

### ***Additional Accessories Required***

- Tow bar attachment (on all 3 forklifts)
- Spare set of forks for T2 900mm for yard bins (for T2 Forklift only)

- Parking Alarm (on all 3 forklifts)
- Access control (on all 3 forklifts)
- Truck to be coloured orange on main body with black or dark grey enclosure (on all 3 forklifts)

## **Warranty**

It is required that a minimum manufacturer's warranty of 36 months is supplied.

A further possible 2 year warranty price is requested (for information) and may be taken up.

## **Acceptance Testing**

It is appreciated conducting a Factory Acceptance is not applicable in the purchase of this nature, but NOC would consider a full function test at delivery to be conducted in the presence of suppliers representative to ensure vehicles operate as specified.

## **Required Documentation**

A minimum of the following documentation should be supplied along with purchase of vehicles

- Log books
- CE conformity documentations
- All PUWER and LOLER certification
- Manufactures hand book
- Service record booklet

## **Delivery**

### ***Delivery Address***

The forklifts are to be delivered to:

National Oceanography Centre  
European Way  
Empress Docks  
Southampton  
Hampshire  
UK  
SO14 3ZH

### ***Required by Date***

Delivery required 12 weeks from award of contract.

Removal of part exchanged vehicles at time of acceptance of new vehicles.

### ***Freighting Terms***

INCOTERMS 2010 DDP NOC Southampton (for delivery of new vehicles)

INCOTERMS 2010 FCA NOC Southampton (for collection of part exchange stock)

## Section 5 – Evaluation model

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

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

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

| Pass / fail criteria |        |   |
|----------------------|--------|---|
| Questionnaire        | Q No.  | Question subject  |
| Commercial           | SEL1.2 | Employment breaches/ Equality                                 |
| Commercial           | FOI1.1 | Freedom of Information Exemptions                             |
| Commercial           | AW1.1  | Form of Bid   |
| Commercial           | AW1.3  | Certificate of Bona Fide Bid                                  |
| Commercial           | AW3.1  | Validation check  |
| Commercial           | AW4.1  | Contract Terms  |
| Price                | AW5.5  | E Invoicing   |
| Price                | AW5.6  | Implementation of E-Invoicing                                 |
| Quality              | AW6.1  | Compliance to the Specification                               |
| -                    | -      | Invitation to Quote – received on time within e-sourcing tool |

| Scoring criteria  |       |                  |               |
|---|-------|------------------|---------------|
| <b>Evaluation Justification Statement</b>   |       |                  |               |
| In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type. |       |                  |               |
| Questionnaire   | Q No. | Question subject | Maximum Marks |
| Price   | AW5.2 | Price            | 100%          |

## Evaluation of criteria

### Non-Price elements

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

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

**Example** if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation: Score/Total Points available multiplied by 20 ( $60/100 \times 20 = 12$ )

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

**Example** if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ( $60/100 \times 10 = 6$ )

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

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

|     |  |
|-----|--|
| 0   | The Question is not answered or the response is completely unacceptable.   |
| 10  | Extremely poor response – they have completely missed the point of the question.   |
| 20  | Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.  |
| 40  | Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.  |
| 60  | Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.   |
| 80  | Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.   |
| 100 | Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider. |

All questions will be scored based on the above mechanism. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score.

### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

Your final score will  $(60+60+40+40) \div 4 = 50$

**Price elements** will be judged on the following criteria.

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

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

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

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

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

Once the evaluation process and due diligence is complete, should the result of the process result in a tied place(s) then the supplier(s) who scored the highest total in the Price criterion (Question)

## **Section 6 – Evaluation questionnaire**

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on completion of the questionnaire is available at <http://www.ukpbs.co.uk/services/procure/Pages/supplier.aspx>

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

## Section 7 – General Information

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

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions.
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.
- 7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our ITQ. You should note that typically we will release the answer to the question to all bidders and where we suspect the question contains confidential information we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who your customer is and what they want – a generic answer does not necessarily meet every customer's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear and concise contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do check and recheck your Bid before dispatch.

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

### DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Customer to discuss your Bid. If your Bid requires clarification the Buyer will contact you.
- 7.16 Do not contact any UK SBS staff or Customer staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or Customer staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

## Some additional guidance notes

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.33 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.34 Bidders may only amend the Contract terms if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.
- 7.35 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.38 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks

the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.39 All timescales are set using a 24 hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Emptoris.
- 7.40 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

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

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

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

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

## USEFUL INFORMATION LINKS

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)
- [Contracts Finder](#)
- [Tenders Electronic Daily](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)