



# Invitation to Quote

Questions

Invitation to Quote (ITQ) on behalf of **UK Research and Innovation**

**Subject:** **Scoping the skills needs in the social sciences to support data-driven research**

**Sourcing Reference Number:** **CR20042**

## **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.uksbs.co.uk/services/procure/Pages/supplier.aspx>

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

## COMMERCIAL QUESTIONNAIRE

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
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| <b>SEL1.1</b>    | <b>Please state the full legal name and address and contact details of the organisation tendering (or organisation acting as lead contact where a consortium bid is being submitted).</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| Bidder Guidance  | The information should be based on the details of the organisation bidding (or organisation acting as lead contact where a consortium bid is being submitted).<br>This is the legal entity with whom we will Contract if successful.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| Scoring Criteria | For information only                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| Answer Type      | <div style="background-color: yellow;"> Text <table border="1" style="width: 100%;"> <tr> <td style="width: 5%;">(a)</td><td style="width: 70%;">Bidders full legal name</td><td style="width: 25%;"></td></tr> <tr> <td>(b)</td><td>Address line 1</td><td></td></tr> <tr> <td></td><td>Address line 2</td><td></td></tr> <tr> <td></td><td>Address line 3</td><td></td></tr> <tr> <td></td><td>Address line 4</td><td></td></tr> <tr> <td></td><td>Town / City</td><td></td></tr> <tr> <td></td><td>Country</td><td></td></tr> <tr> <td></td><td>Post code (or equivalent)</td><td></td></tr> <tr> <td>(c)</td><td>Bidder contact</td><td></td></tr> <tr> <td>(d)</td><td>Telephone No.</td><td></td></tr> <tr> <td>(e)</td><td>Email</td><td></td></tr> </table> </div> | (a) | Bidders full legal name |  | (b) | Address line 1 |  |  | Address line 2 |  |  | Address line 3 |  |  | Address line 4 |  |  | Town / City |  |  | Country |  |  | Post code (or equivalent) |  | (c) | Bidder contact |  | (d) | Telephone No. |  | (e) | Email |  |
| (a)              | Bidders full legal name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| (b)              | Address line 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Address line 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Address line 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Address line 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Town / City                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Country                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
|                  | Post code (or equivalent)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| (c)              | Bidder contact                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| (d)              | Telephone No.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |
| (e)              | Email                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |     |                         |  |     |                |  |  |                |  |  |                |  |  |                |  |  |             |  |  |         |  |  |                           |  |     |                |  |     |               |  |     |       |  |

  

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| <b>SEL1.2</b>    | <p><b>In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? And/or;</b></p> <p><b>In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination?</b></p>                                                                                                                                                                                                                              |
| Bidder Guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Fail – Please provide details within SEL1.2.1<br/> <b>No</b> – Pass – No response required to SEL1.2.1</p> <p>*If you have answered “yes” please provide, as an attachment to SEL1.2.1 a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> <p>If the investigation upheld the complaint against your organisation, please use the attachment to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the Contracting Authority’s satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.</p> |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Answer Type      | <div style="background-color: yellow;"> <b>Yes</b> – Fail – Please provide details within SEL1.2.1<br/> <b>No</b> – Pass – No response required to SEL1.2.1 </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

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| <b>SEL1.2.1</b>  | <b>Supporting Documentation for SEL1.2.1</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Bidder Guidance  | <p>Where a bidder has responded 'Yes' to SEL1.2 please provide a supporting document attached to this question, including a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> <p>If the investigation upheld the complaint against your organisation, please use the attachment to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the Contracting Authority's satisfaction that appropriate remedial action(s) have been taken to prevent similar unlawful discrimination reoccurring.</p> <p>This information should be provided as an attachment to this question. Any bidder declaring unlawful discrimination within SEL1.2 but not providing evidence may not be considered.</p> |
| Scoring Criteria | For Information Only                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Answer Type      | Document Upload                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

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| <b>SEL1.3</b>    | <b>If you are Commercial organisation with a minimum financial turnover of £36M, please confirm that you are compliant with Section 54 of the Modern Slavery Act 2015.</b>                                                                                                                                                                                                                                                                                                                                                                                               |
| Bidder Guidance  | <p>The Bidder shall choose from the following options;</p> <ul style="list-style-type: none"> <li>A. N/A – our turnover is less than £36M</li> <li>B. Yes – We are compliant and have attached information in SEL1.3.1</li> <li>C. No (with justification) – we are not compliant but will be prior to commencement of a contract. See information attached in SEL1.3.1</li> <li>D. No – we are not and will not be compliant at the time of award of the contract</li> </ul> <p>Bidders selecting option 'D' will be considered non-compliant for this Procurement.</p> |
| Scoring Criteria | Mandatory Pass/ Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Answer Type      | Multiple Choice Dropdown                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

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| <b>SEL1.3.1</b> | <b>Supporting Documentation for SEL1.3</b>                                                                                                                                                                                                                     |
| Bidder guidance | <p>Where a bidder has responded 'Yes' or 'No (with justification)' to SEL1.3, please provide your supporting information as an attachment.</p> <p>Any bidder declaring, they are compliant within SEL1.3 but not providing evidence may not be considered.</p> |
| Scoring         | For information only                                                                                                                                                                                                                                           |

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| Criteria         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Answer Type      | Document upload                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| SEL2.10          | <p><b>Cyber Essentials has been mandatory for central government contracts advertised after 1 October 2014 which involve handling personal information and providing certain ICT products and services. It is mandatory for bidders to demonstrate that they meet the technical requirements prescribed by Cyber Essentials for those contracts featuring any of the characteristics set out below in bidders' guidance.</b></p> <p><b>Cyber Essentials is for all organisations, of all sizes, and in all sectors. This is not limited to companies in the private sector, but is also applicable to universities, charities, and public sector organisations.</b></p> <p><b>Further details are available at:</b><br/> <a href="https://www.cyberstreetwise.com/cyberessentials/">https://www.cyberstreetwise.com/cyberessentials/</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Bidder Guidance  | <p>Any of the following but not limited to typical characteristics, will necessitate the mandatory requirement for bidders to have an up to date Cyber Essentials Certificate:</p> <ul style="list-style-type: none"> <li>i) Where personal information of citizens, such as home addresses, bank details, or payment information is handled by a supplier.</li> <li>ii) Where personal information of Government employees, Ministers and Special Advisors such as payroll, travel booking, or expenses information is handled by a supplier.</li> <li>iii) Where ICT systems and services are supplied which are designed to store, or process, data at the OFFICIAL level of the Government Protective Marking scheme.</li> <li>iv) Contracts that are considered by the Contracting Authority to be sensitive in character</li> </ul> <p>Bidders can answer</p> <p><b>Yes</b> – the Cyber Essential Certificate is currently in place</p> <p><b>Intend</b> – the Cyber Essential Certificate is not in place and we intend to have it in place for commencement of the contract.</p> <p><b>No</b> – the Cyber Essential Certificate is not in place and we have no intention of having it in place for commencement of the contract</p> <p>A response of '<b>Yes</b>' or '<b>Intend</b>' will result in a <b>pass</b> and a response of '<b>No</b>' will result in a <b>fail</b> against this question.</p> |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Answer Type      | <p>Multiple Choice Dropdown</p> <p><b>Yes</b> – the Cyber Essential Certificate is currently in place</p> <p><b>Intend</b> – the Cyber Essential Certificate is not in place and we intend to have it in place for commencement of the contract.</p> <p><b>No</b> – the Cyber Essential Certificate is not in place and we have no intention</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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|  | of having it in place for commencement of the contract |
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| <b>SEL2.12</b>   | <p><b>General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018</b></p> <p>The GDPR is a mandatory requirement for all contracts or agreements both in the Public and the private sectors that involves the transfer and processing of personal data, which came into force on the 25th May 2018.</p> <p>It is mandatory for bidders to demonstrate that they are able to meet the technical requirements and obligations prescribed by the GDPR.</p> <p>All contracts or agreements that are awarded by the Contracting Authority (the data controller) shall contain terms and conditions that oblige the successful bidder and any bidder supply chain (data processor) used under this to comply with the GDPR and indemnify the Contracting Authority (data controller).</p> <p>Further information and helpful guidance relating to the GDPR is available from the Information Commissioners Office (ICO) at: <a href="https://ico.org.uk/">https://ico.org.uk/</a></p> |
| Bidder Guidance  | <p>The Contracting Authority actively encourages all bidders to ensure that they visit the ICO website via the advised link and understand the implications of the GDPR and have your Data Protection Officer complete this section if you have one or attentively seek external professional advice before completing this section of your bid</p> <p>Bidders can answer</p> <p><b>Yes</b> – We can demonstrate full compliance as is required by the GDPR now – <b>Pass</b></p> <p><b>No</b> – We will not be compliant prior to any award and we have no intention of being compliant – <b>Fail</b></p>                                                                                                                                                                                                                                                                                                                                                                                          |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Answer Type      | <p><b>Yes</b> – We can demonstrate full compliance as is required by the GDPR now – <b>Pass</b></p> <p><b>No</b> – We will not be compliant prior to any award and we have no intention of being compliant – <b>Fail</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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| <b>SEL2.13</b>  | <p><b>Data Storage</b></p> <p>Please confirm where GDPR data will be stored for the duration of this Contract, including any additional Countries that data may be transferred to throughout the life of this Contract.</p>                                                                       |
| Bidder Guidance | <p>Bidders are required to confirm where GDPR data will be stored for the duration of this Contract, including any additional Countries that data may be transferred to throughout the life of this Contract</p> <p>Please note, where bidders confirm that data may be stored or transferred</p> |

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|                  | outside of the UK, there may be a requirement to include additional Contract Clauses to ensure GDPR Compliance. |
| Scoring Criteria | For Information Only                                                                                            |
| Answer Type      | Free Text                                                                                                       |

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| <b>FOI1.1</b>    | <p><b>FREEDOM OF INFORMATION ACT 2000 (FOIA) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR)</b></p> <p>Information provided in the course of the procurement process may be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004.</p> <p>Please note that some of the information provided may be protected under the FOIA exemptions and EIR exceptions. More information on applying the exemptions or exceptions can be found under the information Commissioners Office (ICO) website <a href="http://ico.org.uk">http://ico.org.uk</a></p> <p>Please confirm you have been informed that information provided under this Bid may be disclosed under the FOIA and EIR and agree to it being published.</p> |
| Bidder Guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Answer Type      | <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>FOI1.2</b>   | <p><b>FREEDOM OF INFORMATION ACT 2000 AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 EXEMPTIONS</b></p> <p>Please complete this section <u>only</u> if you have agreed for your information to be disclosed under the FOIA or EIR in FOI1.1<br/>If you have not agreed for your information to be disclosed under the FOIA or EIR in Question FOI1.1 please complete each field 'N/A' (not applicable)</p> <p>If you have agreed for your information to be disclosed under the FOIA or EIR in Question FOI1.1 please tell us what exemptions or exceptions may apply to your information and why?</p>                                     |
| Bidder Guidance | <p>The Bidder shall provide details of their proposed exemptions/exception in the fields below.</p> <p>The Bidder shall note that if the Contracting Authority believes that the suggested exemptions or exceptions have not been applied properly, the Contracting Authority will disclose the requested information unless another exemption or exception can be applied by the Contracting Authority.</p> <p>Be aware that by completing FOI1.1 and answering 'yes' you have agreed for the Contracting Authority to disclose the provided information under the Freedom of Information Act 2000 or Environmental Information Regulation</p> |

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|                  | <p>2004; therefore, you will not be approached for consent.</p> <p>Bidders are required to complete the table fields below, highlighting your proposed exemptions to this question.</p> <p>If you are not relying on any exemptions or exceptions, please complete each field 'N/A' (not applicable).</p> |
| Scoring Criteria | For information only                                                                                                                                                                                                                                                                                      |
| Answer Type      | Confidential Information and justification for exemption/exception under FOI Act                                                                                                                                                                                                                          |
|                  | Large Text Field                                                                                                                                                                                                                                                                                          |
|                  | Commercially sensitive information and justification for exemption/exception under FOI Act                                                                                                                                                                                                                |
|                  | Large Text Field                                                                                                                                                                                                                                                                                          |

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| AW1.1 | <p><b><u>FORM OF BID</u></b></p> <p>I declare that to the best of my knowledge the answers submitted in this ITQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to bid for the Contracting Authority's requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this ITQ if there is a failure to answer all relevant questions fully or if I provide false/misleading information.</p> <p>I understand that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by the Contracting Authority, including the ITQ, and any contract entered into by the Contracting Authority or its customers with its preferred supplier once the procurement is complete.</p> <p>By submitting a response to this ITQ I agree that our participation may be made public.</p> <p>I understand that the answers given in this response will not be published on the web site (but may fall to be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004).</p> <p>By submitting a response to this ITQ I agree and accept the justification for the Contracting Authority's evaluation criteria.</p> <p>By submitting a response to this ITQ I agreed and accept that the Contracting Authority reserves the right to change without notice the procedure for awarding the Contract, to reject any or all bids for the Contract, to stop the process and not award the Contract (in whole or in part) at any time without any liability on its part.</p> <p>By submitting a response to this ITQ I agree and accept that nothing in this process is intended to form any express or implied contractual</p> |
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|                  | <p>relationship between the Parties unless and until a Contract is awarded. The Contracting Authority is not liable for any costs resulting from cancellation of this process nor any costs incurred by Bidders taking part in this procurement process.</p> <p>I understand that where sourcing documents issued by the Contracting Authority or contracts with its suppliers fall to be disclosed the Contracting Authority will redact them as it thinks necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.</p> |
| Bidder Guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> - Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Answer Type      | <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

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| <b>AW1.3</b> | <p><b>CERTIFICATE OF BONA FIDE BID</b></p> <p>The essence of procurement is that the customer shall receive bona fide competitive Bids, from all those Bidding. In recognition of this principle, we certify that this is a bona fide Bid, intended to be competitive and that we have not fixed or adjusted the amount of Bid by or under or in accordance with any agreement with any other person.</p> <p>We also certify that we have not done, and we undertake that we will not do at any time before the hour and date specified for the return of this Bid any of the following:</p> <ul style="list-style-type: none"> <li>(a) Communicate to a person other than the person calling for these Bids the amount or approximate amount of the proposed Bid, except where the disclosure, in confidence, of the approximate amount of the Bid was necessary to obtain insurance premium quotations for the preparation of the Bid;</li> <li>(b) Enter into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any Bid to be submitted;</li> <li>(c) Offer to pay or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or have caused to be done in relation to any other Bid or proposed Bid for the said supply / service any act or thing of the sort described above.</li> </ul> <p>In this certificate, the word "person" includes any persons and anybody or association, corporate or unincorporated, and any "agreement or arrangement" includes any such transaction, formal or informal, and whether legally binding or not.</p> <p>We acknowledge that the Contracting Authority will be entitled to cancel the contract and to recover from us the amount of any loss resulting from such cancellation if we or our representatives (whether with our</p> |
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|                  | <p>without our knowledge) shall have practiced collusion in Bidding for this contract or any other contract with the Contracting Authority or shall employ any corrupt or illegal practices either in the obtaining or execution of this contract or any other contract with the Contracting Authority.</p> <p>We agree that the Contracting Authority may disclose the Bidders information / documentation (submitted to the Contracting Authority during this Procurement) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.</p> |
| Bidder Guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Answer Type      | <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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| <b>AW3.1</b>     | <p>In the event of a Bidder successfully providing the most advantageous offer to the Contracting Authority against a procurement requirement, the Bidder is expected to provide an answer to the validation check that can be seen within Stage One: Overview Section prior to the award of any Contract.</p> <p>If the Bidder fails to meet the Contracting Authority's expectations, we reserve the right to not award the Contract to the relevant Bidder and either award to the Bidder with the second most advantageous response or run a new procurement.</p> |
| Bidder Guidance  | <p>The Bidder is not required to complete the validation check at this stage but will be required to respond to the questions in the event of providing the most advantageous offer to the Contracting Authority's against a procurement requirement.</p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                               |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Answer Type      | <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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| <b>AW4.1</b>    | <p>Please confirm your acceptance of the Contract Terms that can be found within UKRI Precedent Supplies Services Contract (Low value) that can be found within the Stage One: Overview section.</p>                                                                                                                                  |
| Bidder Guidance | <p>The Bidder shall answer <b>Yes, No with justification</b> or <b>No</b></p> <p><b>Yes</b>, we accept the terms and condition in their entirety – Pass</p> <p><b>No with justification</b> – Pass. Complete the document upload attached to AW4.2 with details of what amounts to a valid justification.</p> <p><b>No</b> – Fail</p> |

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|                  | If you select 'Yes', 'No with Justification' or 'No' you will be required to complete AW4.2 in order to be considered.                                                                                                                                                    |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                     |
| Answer Type      | Multiple Choice Dropdown<br><br><b>Yes</b> , we accept the terms and condition in their entirety – Pass<br><b>No with justification</b> – Pass. Complete the document upload attached to AW4.2 with details of what amounts to a valid justification.<br><b>No</b> – Fail |

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| <b>AW4.2</b>    | <p><b>Where a Bidder has answered question AW4.1 with 'No with justification' they must detail the justification and the proposed change to the clause.</b></p> <p><b>Where a bidder has responded 'Yes' or 'No' to AW4.1 you will need to respond to this question with an attachment stating N/A</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Bidder Guidance | <p>A justification for not accepting a specific clause or series of clauses from the attached Contract Terms is that the Bidder would be in breach of legal requirements or statutory regulations by complying with that clause or series of clauses (i.e. for the avoidance of doubt, being unable to comply with a clause or series of clauses because of an internal policy reason will not be considered to be a justification for a legal requirement or statutory regulation).</p> <p>Where the Bidder has answered question AW4.1 as "no with justification", the Bidder shall provide a Contract mark-up utilising track changes detailing the relevant clause, the proposed changes to the clause and the justification for the changes. In this case, the Bidder shall score a pass if (but only if) the Contracting Authority considers both the following requirements are satisfied:</p> <ul style="list-style-type: none"> <li>• the reasons stated as justifying the Bidder's statement that it cannot accept the Contract Terms due to legal requirements or statutory regulations are valid; and</li> <li>• the changes submitted do not create significant risk for the Contracting Authority and are reasonably necessary and proportionate to ensure the Bidder complies with the legal requirements and statutory regulations.</li> </ul> <p>In the event of a Bidder answering Yes or No to Question AW4.1 and then providing a proposed mark-up, rejection of a clause or a justification for a change then the response will be a Fail.</p> <p>Any bidder selecting 'No with Justification' to AW4.1 and failing to upload an attachment to this question detailing the information above may not be considered further.</p> <p>Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, should be raised as a formal clarification during the permitted clarification period.</p> <p><b>For absolute clarity should a bidder response to AW4.1 be 'Yes' or 'No' the bidder will need to upload a document in response to AW4.2 stating</b></p> |

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|                  | <b>'N/A'. If the bidder fails to do this the bid submission will fail to upload and the bid will not be considered.</b> |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                   |
| Answer Type      | Document Upload                                                                                                         |

## PRICE QUESTIONNAIRE

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| <b>AW5.1</b>     | <p><b><u>Maximum Budget</u></b></p> <p>As stated within the tender documents, the maximum budget for this requirement will be £100,000.00 ex VAT. This should include all costs relating to the projects as well as Travel, Subsistence and Overhead costs.</p> <p>Please confirm that your final price submitted within AW5.2 will fall within this budget.</p> |
| Bidder guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                                                                             |
| Scoring criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                            |
| Bidder response  | Yes / No                                                                                                                                                                                                                                                                                                                                                         |

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| <b>AW5.2</b>    | <p><b>Bidders are required to complete the Excel Pricing Schedule attached in the Document Upload attachments.</b></p> <p><b>All prices shall be in £ GBP and exclusive of VAT.</b></p> <p><b>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Bidder Guidance | <p>Bidders shall confirm they have completed the Pricing Schedule.</p> <p>The scoring methodology for this question shall be:</p> <p>The lowest price for a response which meets the pass criteria shall score 100.</p> <p>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.</p> <p>Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50</p> <p>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 x 50 = 40)</p> <p>The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.</p> <p>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 lowest score possible is 0.</p> |

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|                  | <p>For example, assuming the lowest bid is £100,000.</p> <p>Bid Price £100,000<br/>Differential to the lowest price which meets mandatory pass criteria ('Differential') 0 Score 100</p> <p>Bid price - £120,000 Differential - 20% Score - 80<br/>Bid price - £140,000 Differential - 40% Score - 60<br/>Bid Price - £150,000 Differential - 50% Score - 50<br/>Bid Price - £175,000 Differential - 75% Score - 25<br/>Bid Price - £200,000 Differential - 100% Score - 0<br/>Bid Price - £300,000 Differential - 200% Score - 0</p> |
| Scoring Criteria | Maximum Marks: 10%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Answer Type      | Price Document Upload                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

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| <b>AW5.4</b>     | <p><b>The Contracting Authority is committed to delivering payments to suppliers within the timescales stated within our Contract terms and intend to embrace e-invoicing.</b></p> <p><b>Options for suppliers to choose from are outlined in the FAQ documentation that can be found within Stage One: Overview. Please confirm your acceptance of e-payment.</b></p> |
| Bidder Guidance  | <p>The Bidder shall answer Yes or No</p> <p><b>Yes</b> – we will utilise an e-invoicing option - Pass<br/><b>No</b> – we will not utilise an e-invoicing option – Fail</p>                                                                                                                                                                                             |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                                                                                                                                  |
| Answer Type      | <p><b>Yes</b> – we will utilise an e-invoicing option - Pass<br/><b>No</b> – we will not utilise an e-invoicing option – Fail</p>                                                                                                                                                                                                                                      |

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| <b>AW5.5</b>     | <p><b>Please confirm if you are successfully awarded this contract your implementation team will work with the Contracting Authority to ensure that e-invoicing is established within 28 days of Contract award by the Contracting Authority.</b></p> |
| Bidder Guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                  |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                 |
| Answer Type      | <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                                                                         |

## QUALITY QUESTIONNAIRE

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| <b>AW6.1</b>     | <b>Please confirm your compliance to the requirements of Section 4 Specification</b>         |
| Bidder Guidance  | The Bidder shall answer <b>Yes</b> or <b>No</b><br><br><b>Yes</b> – Pass<br><b>No</b> – Fail |
| Scoring Criteria | Mandatory Pass / Fail                                                                        |
| Answer Type      | <b>Yes</b> – Pass<br><b>No</b> – Fail                                                        |

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| <b>AW6.2</b>     | <b>Variable Bids</b><br><br><b>The Contracting Authority shall not accept variable bids as part of this Procurement. The criteria in regard to variable bids for this Procurement is outlined below.</b>                                                 |
| Bidder Guidance  | The Bidder shall answer <b>Yes</b> or <b>No</b><br><br><b>Yes</b> - We have provided a variable bid only – <b>Fail</b><br><b>No</b> - We have chosen to only offer a main bid and have not chosen to provide an alternative bid submission – <b>Pass</b> |
| Scoring Criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                    |
| Answer Type      | <b>Yes</b> - We have provided a variable bid only – <b>Fail</b><br><b>No</b> - We have chosen to only offer a main bid and have not chosen to provide an alternative bid submission – <b>Pass</b>                                                        |

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| <b>PROJ1.1</b>         | <b><u>Approach/ Methodology</u></b><br><br>Please clearly explain and give reasoning for your proposed methodology and approach to achieving the objectives and delivering the outputs highlighted in the specification.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Bidder guidance</b> | As a minimum your response should: <ul style="list-style-type: none"> <li>• Set out a clear vision for the project</li> <li>• Outline how your approach meet the project objectives;</li> <li>• Give a <u>detailed description</u> of the methods to be used in undertaking the project, indicating who in the team will be undertaking the work and the resources that will be utilised.</li> <li>• Provide a clear justification as to why your chosen methodology will deliver the best outcome;</li> <li>• Detail how relevant stakeholder groups and key individuals are expected to engage in the project.</li> <li>• Reference how specific aspects of the scoping study will be addressed: <ul style="list-style-type: none"> <li>- the skills requirements and opportunities to build capacity at different stages of the research career i.e. PhD, early, mid and senior.</li> <li>- the skills required to exploit a range of different types of data including cohort/survey, biosocial, administrative and new and emerging forms of</li> </ul> </li> </ul> |

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|                         | <p>data.</p> <ul style="list-style-type: none"> <li>- The needs of both qualitative and quantitative researchers</li> <li>- The breadth of social science disciplines</li> <li>- The implications for training in other areas e.g. research design skills.</li> </ul> <p>An attachment is allowed for this question</p> <p>This question is limited to 5 sides of A4. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm.</p> |
| <b>Scoring criteria</b> | <p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Maximum Mark: 25%</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Bidder response</b>  | Document Upload.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>PROJ1.2</b>          | <p><b><u>Staff to Deliver</u></b></p> <p>Please demonstrate your knowledge of the skills and expertise that are essential to the successful delivery of this project. Please provide your methodology as to how you will maintain your ability to deliver these through the lifetime of the project.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Bidder guidance</b>  | <p>Bidders are asked to demonstrate:</p> <p>As a minimum your response should include:</p> <ul style="list-style-type: none"> <li>• The skills and expertise that the project team will bring to the project including the disciplinary expertise of the team and awareness of the breadth of the social sciences;</li> <li>• Explicitly link how the skills and expertise of the project team to the aims and objectives of the project. How will the expertise of the project team enable the successful implementation of your proposed approach</li> <li>• How you will work collaboratively, for example across disciplines or sectors relevant to this project;</li> <li>• Experience of liaising and networking within the social science community and associated bodies at a national and international level</li> <li>• Understanding of building capability in data driven research as well as the Higher Education training and funding landscape</li> <li>• Any additional support that would be needed and from whom, in order to undertake and complete this project;</li> </ul> <p>An attachment is allowed for this question</p> <p>This question is limited to 5 sides of A4. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm.</p> |
| <b>Scoring criteria</b> | <p>Scoring shall be based on 0-100 scoring methodology.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |



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|                        | <b>Maximum Mark: 25%</b> |
| <b>Bidder response</b> | <b>Document Upload.</b>  |

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| <b>PROJ1.3</b>          | <p><b><u>Understanding the Environment</u></b></p> <p>Demonstrate your understanding of the project environment, detailing any knowledge relevant to the project and policy/programme area, including any data sources or research relevant to the project.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Bidder guidance</b>  | <p>Bidders are asked to demonstrate:</p> <p>As a minimum your response should include:</p> <ul style="list-style-type: none"> <li>• Interpretation of the project and what is required</li> <li>• How the bidder will ensure the successful delivery of this project within the working environment</li> <li>• Knowledge of the priorities for building capability in data-driven research, both within the social sciences and at the boundaries between the social sciences and other areas of scientific enquiry</li> <li>• Knowledge of the issues relating to the skills and career pathways needed to build capability in data driven research in the social sciences at different career stages (both quantitative and qualitative), including ethical concerns</li> <li>• An understanding of the communities most relevant to this work and an ability to engage with them'.</li> </ul> <p>An attachment is allowed for this question</p> <p>This question is limited to 4 sides of A4. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm.</p> |
| <b>Scoring criteria</b> | <p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Maximum Mark: 20%</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Bidder response</b>  | <b>Document Upload.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

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| <b>PROJ1.4</b>         | <p><b><u>Project Plan, Timescales and Risk</u></b></p> <p>Please outline your proposed project plan and timescales, ensuring the key deadlines outlined in the specification are met. Please also provide details of how you will manage risk in this project.</p> |
| <b>Bidder guidance</b> | <p>Bidders are asked to demonstrate/provide:</p> <p>As a minimum, your response should cover;</p>                                                                                                                                                                  |

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|                  | <ul style="list-style-type: none"> <li>• A detailed timetable for carrying out the work based on the proposed approach and method</li> <li>• Highlight key milestones and deadlines, including suggested meetings and progress reports.</li> <li>• Risk management, identifying key risks associated with the project and the tools and processes that will be used to mitigate them, specific reference must be made to the changing circumstances relating to the current Covid-19 coronavirus pandemic.</li> </ul> <p>An attachment is allowed for this question</p> <p>This question is limited to 4 sides of A4. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p> |
| Scoring criteria | Maximum Mark: 20%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Bidder response  | Document Upload.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

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| PROJ1.5          | <p><b><u>Capacity</u></b></p> <p>Do you have the capacity to complete the deliverables within the timeframes? Please confirm your ability to have everything in place in order to begin this contract from <b>Tuesday, 1<sup>st</sup> September 2020.</b></p> |
| Bidder guidance  | <p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass<br/><b>No</b> – Fail</p>                                                                                                                                                          |
| Scoring criteria | Mandatory Pass / Fail                                                                                                                                                                                                                                         |
| Bidder response  | Yes / No                                                                                                                                                                                                                                                      |