Statement of Methodology and Criteria to be adopted in evaluating tenderer's submissions.

Evaluation of Tenders

Scholarships 2024 - SW

1.1 Tender Lotting

This tender consists of 3 lots, each with their own specification which can be found within the procurement pack (Specification Documents 2 a-c):

- **Lot 1 - ECITB SCHOLARSHIP 2024 2a – Welding**
- **Lot 2 - ECITB SCHOLARSHIP 2024 2b – Mechanical**
- **Lot 3 - ECITB SCHOLARSHIP 2024 2c – Pipe Fitting**

Bidders can submit offers for one, two, or all three lots as detailed within the relevant specifications.

For each lot you bid on, you **must** submit a separate Pre-Qualification Questionnaire (PQQ) and Invitation to Tender (ITT). If you are bidding on multiple lots, you may copy the general information from your first PQQ and ITT submission into the others. Any changes or lot-specific details should be highlighted in red.

1.2 Tender submissions

The pre-qualification questionnaire (PQQ) and Invitation to Tender (ITT) responses must be completed and submitted with your Tender submission (including any supporting documents or evidence).

The ECITB panel will evaluate and score the information provided by the tenderer individually per Lot.

1.3 Evaluation of Tender Submissions (PQQ with ITT)

Tenderers bid submissions will be evaluated in accordance with the criteria set out within this document.

Each of the questions set out fall within one of the following evaluation categories:

"**FIO**" – this means the response is for information only, and will not be evaluated; however, in order to provide a compliant response Tenderers must answer these questions in full to the extent they are applicable;

"**P/F**" – the response will be assessed as being either a "Pass" or "Fail" in accordance with the explanations given for each individual question; or

"Scored" – the response attracts a specific weighting as identified and will be scored in accordance with the stated methodology.

Stage 1 – Completeness check (All tender documents)

In the first instance, Tenderers' responses will be assessed for completeness to ensure that the Tenderer has provided a full response to all questions and in accordance with the requirements set out in the PQQ and ITT documents. Any Tenderer which has not provided a complete response in accordance with the stated requirements may, subject to the Panel's right of clarification, be excluded from further participation in this procurement. For the avoidance of doubt, Tenderers who submit a PQQ and /or ITT response which is materially incomplete, such that any omissions cannot be resolved by way of simple explanation, will be excluded from the procurement at this point.

Stage 2 – Pass/Fail check (PQQ)

At this stage, Tenderers will have their responses to those questions set out in the PQQ which are designated as Pass/Fail assessed against the relevant criteria. An explanation as to what constitutes a "Pass" and a "Fail" for each question is contained in Appendix 1 to this document. For the avoidance of doubt, a Tenderer which receives a "Fail" for any of these questions will, subject to the Panel's right of clarification, be excluded from further participation in this procurement at this point and the Panel reserves the right not to evaluate such Tenderer's response further.

Stage 3 – Scoring (ITT Section 1 & 2)

Only those Bidders which have passed stages 1 and 2 above will proceed to this phase of the evaluation process. At this point, the Panel will consider those Tenderers' responses to the "Scored" ITT questions against the award criteria set below. Section 1 covers the pricing submission and Section 2 the quality and non-price questions. The panel will evaluate the submissions, as outlined below and may ask clarification questions of bidders as required to better understand their submission.

1.4 Pre-qualification Questionnaire (PQQ)

Please complete all questions within the pre-qualification questionnaire (PQQ). Please note that the PQQ will be evaluated as per the details within Appendix 1 below.

1.5 Invitation to Tender (ITT)

Section 1 – Price Submission (40% weighting)

Scores will be awarded for price on the following basis (per Lot):

The lowest Total Group Cost in Sterling GBP (including VAT if applicable) submitted in accordance with the Price information requirements in Section 1, will be awarded the highest score (a mark of 40%).

All other bidders will be awarded pro rata scores on the relative competitiveness of their Total Group Cost compared to the lowest Total Group Cost e.g. (Total Group Cost – Lowest Total Group Cost / Lowest Total Group Cost * 100) = X%. This percentage will be deducted from the total score (40%) available for Total Group Cost.

1.6 ITT Section 2 – Quality / Non priced Submission (60% weighting)

The evaluation panel will evaluate the responses provided within the completed Invitation to Tender (ITT) individually, per Lot as detailed above in section '1.2 - Tender Submissions'.

The evaluation panel will use the below scoring methodology for the evaluation of tenderer's ITT submissions for the questions marked as 'Scored' within Section 2 – Quality, per Lot:

Scoring Matrix:

Score	Definition	Description
10	Excellent	The Bidder has provided a response which addresses all requirements of the question and provides the ECITB the **utmost level of confidence.**
7	Good	The Bidder has provided a response which addresses all requirements of the question and provides the ECITB a **good level of confidence.**
5	Adequate	The Bidder has provided a response which addresses all requirements of the question and provides the ECITB an **adequate level of confidence.**
3	Poor	The Bidder's response fails to address all requirements of the question and/or the ECITB has **serious reservations.**
0	Unacceptable	Response **does not answer the question and/or is irrelevant and/or is otherwise unacceptable.**

Weightings will then be applied as follows:

Section No.	Question No.	Evaluation Category	Question	Weight (%)
Section 1: Price	1	Scored	Price Information	**40%**
			Section Total:	**40%**
Section 2: Quality	1	Scored	Your Centre	8%
	2	Scored	Training the Scholars	12%
	3	Scored	Assessment of Qualifications	7%
	4	FIO	Knowledge Qualification (If applicable)	-
	5	FIO	Public funding in the Scholarship	-
	6	Scored	Additionality	7%
	7	Scored	Employer engagement	5%
	8	Scored	Inclusivity in recruitment	7%
	9	Scored	Programme evaluation	9%
	10	Scored	Progression to a level 3 or equivalent apprenticeship	5%
			Section Total	**60%**
			Overall Total	**100%**

Subject to meeting the pass/fail criteria within the pre-qualification questionnaire, the ECITB intends to award the contract (per Lot) to the highest scoring Tender based on the ITT responses received for Section 1 – Price and Section 2 - Quality.

However, the ECITB reserves the right not to award all or any of the opportunity to the highest scoring Bidder or to any Bidder.

Appendix 1 – Pre-Qualification Questionnaire (PQQ) scoring methodology

Pass/Fail Criteria

All other information provided within the PQQ is for information only (FIO).

Question(s)	Evaluation Category	Scoring Methodology	Weighting
1.14 to 1.15 2.11 5.8 (1,2,3) 6.3 8.1	Pass/Fail	**Exclusion Grounds** **Pass** = None of the exclusion grounds apply to the Candidate OR one or more of the exclusion grounds does apply but the Candidate has satisfactorily demonstrated its reliability and has therefore been considered to have 'self-cleaned' **Fail** = An exclusion ground applies to the Candidate and the Candidate has not satisfactorily demonstrated its reliability and has therefore not been considered to have 'self-cleaned'. **Pass/fail criteria for Key Sub-Contractors** As stated above in respect of Candidates. Where one or more of the Candidate's Key Sub-Contractors is deemed to 'fail' the above-mentioned criteria, however the Candidate itself is deemed to 'pass' this Question, the ECITB shall notify the Candidate concerned and may provide the Candidate with the opportunity to propose an alternative Key Sub-Contractor. However, in deciding whether to permit this, the ECITB will have regard to whether this would be permissible by the Regulations and in particular, whether this will comply with the principle of equal treatment of all Candidates as further explained in respect of Question 3.2 below.	**N/A**
3.2 to 3.3	Pass/Fail	**Economic and Financial Standing** The ECITB will assess the information which you provide with your PQQ response in response to questions 3.1 to 3.3, to determine whether the Candidate (or its guarantor) has the necessary economic and financial standing to deliver the contract in accordance with the ECITB's requirements.	**N/A**

		In making this assessment, the ECITB will consider the following factors, in combination, as measures of the Candidate's (or its guarantor's) financial standing: 1. **Financial stability:** Whether the Candidate (or any guarantor) can demonstrate a stable trading position, typically whether it has consistently made a profit over the last two financial years (or the number of years of trading if less than two years); or, where there has been a loss, a clear explanation for the future stability of trading can be provided (i.e. loss arose due to early investment in a project or was exceptional and a return to profitability is expected); 2. **Scale:** That the indicative contract value does not form a disproportionate proportion of the Candidate's (or any guarantor's) business, typically that the Candidate's annual turnover is **at least twice** the indicative value of a contract or group of contracts (as defined by the number of lots bid for by a Candidate). 3. **Other financial concerns:** Where any further financial information relating to the Candidate which is in the public domain identifies any other material concerns as to the Candidate's financial standing or stability. **Pass =** A Candidate will pass this section where, based on the ECITB's combined analysis, the ECITB identifies no material risks associated with the Candidate's (or any guarantor's) economic and financial standing and so sees no material risk in the Candidate's (or any guarantor's) financial ability to deliver the ECITB's contract requirements. A Candidate may also pass this section if the ECITB identifies a material risk, but the Candidate (or any guarantor) has offered clarification, mitigating factors or reasons in response to this which, in the reasonable opinion of the ECITB, sufficiently address the previously identified risk such that it is no longer regarded as a material risk in the Candidate's (or any guarantor's) financial ability to deliver the ECITB's contract requirements. The ECITB reserves the right to re-assess a Candidate's financial position at any point during the procurement process, including prior to executing any contract with the	

		successful Bidder. Where a Bidder's financial position subsequently deteriorates to an extent where it no longer satisfies the ECITB's requirements as set out above, the ECITB reserves the right to exclude the Candidate/Bidder concerned from further participation in the process. **Fail:** A Candidate may fail this section where, based on the ECITB's combined analysis, the ECITB identifies a concern regarding the Candidate's economic and financial standing which the ECITB considers to pose a material risk to its ability to deliver the ECITB's contract requirements, and which is not addressed by any offered guarantee from a parent or group company or other entity whose financial standing does not pose a similar material risk. Before failing the Candidate in relation to this section, the ECITB may give the Candidate the opportunity to respond to or clarify the material risk which the ECITB has identified and provide any mitigating circumstances or reasons why this should not be treated as a material risk. The ECITB may decide, at its discretion, that the Candidate should not fail this section having regard to any clarification, mitigating factors or reasons offered by the Candidate which, in the reasonable opinion of the ECITB, sufficiently address the previously identified risk such that it is no longer regarded as material. The ECITB reserves the right to request any information which is deemed missing from a Candidate's response to in Questions 3.1 to 3.3, however, is under no obligation to do so. **Key Sub-Contractors** The ECITB will also assess the economic and financial standing of any Key Subcontractors proposed by the Candidate. Where one or more of the Candidate's Key Sub-Contractors is deemed to 'fail' the above-mentioned criteria, however the lead bidding entity itself is deemed to 'pass' the financial criteria relating to Candidates, the ECITB shall notify the Candidate concerned and may provide the Candidate with the opportunity to propose an alternative Key Sub-Contractor. However, in deciding whether to permit this, the ECITB will have regard to whether this would be permissible by the Regulations and in particular, whether this will comply with the principle of equal treatment of all Candidates. An example of where this may not be permissible could include a scenario where the Candidate is heavily reliant on the Key Sub-Contractor which has failed the financial assessment, and as	

		a consequence, the removal of the requisite Key Sub-Contractor from its bidding structure would require an entirely different response/render a different outcome to the technical and professional ability criteria/assessment set out within this PQQ. Prior to entering into a contract with the successful Bidder, the ECITB reserves the right to reassess the Candidate and each of its Key Sub-Contractors against the PQQ financial criteria. In performing this task in respect of Key Sub-Contractors, the ECITB will consider the proportion of the services which are intended to be delivered by each Key Sub-Contractor and the criticality of those services. The ECITB may therefore reapply the PQQ financial assessment criteria against those considerations, in determining whether each Key Sub-Contractor is deemed to possess a satisfactory level of economic and financial standing and reserves the right to attribute a 'fail' in respect of a Key Sub-Contractor, where concerns arise. the ECITB reserves the right to further clarify the financial status of a Key Sub-Contractor further, prior to attributing a 'fail' at this point, but is under no obligation to do so.	
4.1 to 4.3	Pass/Fail	**Insurance** **Pass** = where the Candidate is able to commit to obtaining the type/level of insurance required prior to commencement of the contract. **Fail** = where the Candidate does not meet the criteria for a 'pass' in respect of this question.	**N/A**