

# Invitation to Quote



## Department for Energy Security & Net Zero

**Invitation to Quote (ITQ) on behalf of Department for Energy  
Security & Net Zero (DESNZ)**

**Subject: Digital Standards Landscaping**

**Sourcing Reference Number: PS24190**

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

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

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

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

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

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

### Our Customers

DESNZ

UKSBS currently manages £700m expenditure for its Contracting Authorities.

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

### **Privacy Statement**

At UK Shared Business Services (UKSBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UKSBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.
- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

## **Privacy Notice**

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the UK General Data Protection Regulation (UK GDPR).

### **YOUR DATA**

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;  
Names and contact details of employees proposed to be involved in delivery of the contract;  
Names, contact details, age, qualifications and experience of employees whose CVs are submitted as part of the bid.

#### *Purpose*

The Contracting Authority are processing your personal data for the purposes of the tender exercise, or in the event of legal challenge to such tender exercise.

#### *Legal basis of processing*

The legal basis for processing your personal data is processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller, such as the exercise of a function of the Crown, a Minister of the Crown, or a government department; the exercise of a function conferred on a person by an enactment; the exercise of a function of either House of Parliament; or the administration of justice.

#### *Recipients*

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

#### *Retention*

All submissions in connection with this tender exercise will be retained for a period of 7 years from the date of contract expiry, unless the contract is entered into as a deed in which case it will be kept for a period of 12 years from the date of contract expiry.

### **Your Rights**

You have the right to request information about how your personal data are processed, and to request a copy of that personal data.

You have the right to request that any inaccuracies in your personal data are rectified without delay.

You have the right to request that any incomplete personal data are completed, including by means of a supplementary statement.

You have the right to request that your personal data are erased if there is no longer a justification for them to be processed.

You have the right in certain circumstances (for example, where accuracy is contested) to request that the processing of your personal data is restricted.

You have the right to object to the processing of your personal data where it is processed for direct marketing purposes.

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

### ***International Transfers***

As your personal data is stored on our IT infrastructure and shared with our data processors Microsoft and Amazon Web Services, it may be transferred and stored securely in the UK and European Economic Area. Where your personal data is stored outside the UK and EEA it will be subject to equivalent legal protection through the use of Model Contract Clauses.

### **Complaints**

If you consider that your personal data has been misused or mishandled, you may make a complaint to the Information Commissioner, who is an independent regulator. The Information Commissioner can be contacted at:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF  
0303 123 1113  
[casework@ico.org.uk](mailto:casework@ico.org.uk)

Any complaint to the Information Commissioner is without prejudice to your right to seek redress through the courts.

### **Contact Details**

The data controller for your personal data is:

The Department for Energy Security & Net Zero (DESNZ)

You can contact the Data Protection Officer at:

DESNZ Data Protection Officer, Department for Energy Security & Net Zero 3-8 Whitehall Place, London, SW1A 2ED. Email: [dataprotection@energysecurity.gov.uk](mailto:dataprotection@energysecurity.gov.uk)

## Section 2 – About the Contracting Authority

### Department for Energy, Security and Net Zero (DESNZ)

The Department for Energy Security and Net Zero (DESNZ) is focused on the energy portfolio from the former Department for Business, Energy and Industrial Strategy (BEIS). Our focus is securing our long-term energy supply, bringing down bills and halving inflation

Our responsibilities

- delivering security of energy supply
- ensuring properly functioning energy markets
- encouraging greater energy efficiency
- seizing the opportunities of net zero to lead the world in new green industries

## Section 3 – Working with the Contracting Authority

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

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	Department for Energy Security and Net Zero (DESNZ) 3-8 Whitehall Place, London, SW1A 2AW
3.2.	Buyer name	Lauren Standfast
3.3.	Buyer contact details	<a href="mailto:Professionalservices@uksbs.co.uk">Professionalservices@uksbs.co.uk</a>
3.4.	Maximum value of the Opportunity	£40,000.00 excluding VAT
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the eSourcing portal. Guidance on how to obtain support on using the eSourcing portal can be found in Section 7.25. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered, unless formally advised to do so by UKSBS.</b>

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Friday, 04 October 2024 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through the eSourcing Portal	Friday, 11 October 2024 11.00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal	Tuesday, 15 October 2024
3.9.	Latest date and time ITQ Bid shall be submitted through the eSourcing Portal ( <b>the Deadline</b> )	Tuesday, 22 October 2024 11.00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday, 13 November 2024
3.11.	Anticipated Contract Award date	Wednesday, 13 November 2024
3.12.	Anticipated Contract Start date	Thursday, 21 November 2024
3.13.	Anticipated Contract End date	Wednesday, 26 February 2025
3.14.	Bid Validity Period	90 Days

## Section 4 – Specification

### 1. Introduction

The purpose of this work is to assess the standards landscape, conduct a gap analysis, and recommend next steps for the development of technical standards that will enable the interoperable exchange of data across various actors within the energy system. The sharing of data within the energy system will make a direct contribution to decarbonising the power sector by 2030 and enable several other policy objectives, including in energy equity and affordability, energy security, net zero, and economic security. However, the Digital Spine feasibility study, which included engagement with over 100 stakeholders, identified that insufficient data interoperability is a key barrier to data sharing within the energy industry. This work is a gap analysis reviewing existing and emerging technical standards for meeting the use cases identified by DESNZ, in order to recommend next steps for standards development, including where existing standards can be adapted to enable interoperable data sharing between energy system stakeholders and where new standards might need to be developed.

### 2. Aims & Objectives

The aim of this work is to develop recommendations for future standards development to enable interoperable data sharing across a data sharing infrastructure for the energy system, based on a review of priority use cases and the existing standards landscape. The aim is to identify where existing standards could be applied, where they can be modified to meet the priority use cases, and to make recommendations where new standards are required.

### 3. Objectives

Objectives:

- 1) Review the priority energy system use cases as specified by DESNZ to produce a set of data types that would be shared as part of a data sharing infrastructure. These data structures should be capable of being sent over multiple different physical layers and network layers (for example, HTML, JSON) giving a consistent presentation to applications using this data.
- 2) Review existing or under development standards, including:
  - a) Standardised data formats for each identified data type.
  - b) Proposals on how to handle private data or data with specific IP sensitivity, highlighting if/how present standards are planning to treat these data while enabling key use cases and ensuring data confidentiality.
- 3) Perform a gap analysis to identify areas requiring standards development to enable interoperable data sharing across a data sharing infrastructure. This includes identifying gaps in the standardisation landscapes for data types and generalised data formats and making recommendations for next steps for standards development.

Outputs:

1. A report evidencing the findings and providing recommendations. The report should include, as a minimum:
  - a) A comprehensive list and description of the data types required to deliver the use cases detailed in the scope.
  - b) A description of the standards that have been selected as relevant to the data types identified, with commentary on their objectives. For emerging technical standards, this should include the technical standards committees responsible for their development and the timescales for their completion.



- c) Recommendations for next steps for each data type based on the gap analysis (e.g. whether existing standards can be applied or adapted or where a new standard is required).
- d) A recommendation of identified standards that could be further developed into a common standard to address the future needs of the sector, or if no standard has been deemed suitable, a recommendation of next steps.

Bidders should note that we may wish to publish a version of this report. The supplier should therefore produce a second version of the report suitable for publication, redacting any commercially sensitive information and in a format that meets Government accessibility guidelines.

#### 4. Background to the Requirement

In August 2024, the government published the Digital Spine feasibility study and a government response. The study examined the needs case, benefits, scope and costs of an energy system 'Digital Spine', or 'data sharing infrastructure' for the interoperable sharing of energy data. It was taken forward by a consortium of Arup, Energy Systems Catapult, and the University of Bath.

The consortium put forward a model of three constituent elements, 'Prepare, Trust, Share' for a data sharing infrastructure in the energy sector. Whilst the 'Trust' and 'Share' elements could be considered as more 'centralised' parts of the infrastructure, the 'Prepare' component is expected to sit in participating organisations – energy system actors – as they format and arrange their data sets for sharing. As such, standards may be necessary to ensure that actors know how to interact with the data sharing infrastructure, thereby facilitating the rapid exchange of interoperable information between actors in the energy sector.

The study assessed how a data sharing infrastructure could be useful in specific use cases, such as to enable local area energy plans to be developed by local authorities or to support increasing levels of flexible operation within the electricity system. The government response to the Digital Spine feasibility study includes commitments that ESO, or NESO once established, take forward further development, based on an 'outage planning' use case to pilot in 2024, and 'strategic planning' minimum viable product (MVP) development in 2025. If successful, more complex use cases, such as those related to flexibility, could be pursued.

There is a large amount of different data that can be used to characterise the energy sector. These different data have different formats or data structures and to be shared in an interoperable way across actors in the energy sector require alignment to a use case agnostic and interoperable data structure standard.

In the response to the Digital Spine feasibility study, the Government recognised a likely role for new standards to enable data sharing, and committed to assess the standards landscape relevant to priority use cases. Similarly, Ofgem has acknowledged the need for data standards and communication protocols to facilitate distributed flexibility within the electricity system and have undertaken a review of standards relevant to distributed flexibility markets. The Data Best Practice Guidance from Ofgem already requires energy network companies to enable interoperability when publishing their data. Elsewhere, NESO are working on developing the Virtual Energy System and have highlighted the need to harmonise existing data standards to enable interoperable data sharing between users of the Virtual Energy System. This work will deliver on the Government's commitment and complement the existing work undertaken and ongoing and Ofgem and NESO.

To understand what standards development is required, a review of technical standards (both existing and under development) for energy sector data needs to be performed to understand the standards landscape.

For example, there are already efforts to standardise overall simple data types in a language independent way that could be utilised (e.g. ISO/IEC 11404). However, it is expected that the data in the energy system will require more complex data types, so this work will complete a gap analysis which will be able to recommend where future standards will be required, and whether standards (completed or under developments) exist today which could support further data sharing infrastructure development. It could be that these more complex data types could be built out of simple data types already standardised in a hierarchical pyramid fashion. A key objective of this specification should recommend how the identified gaps might be filled; for example, by Government sponsoring a new British Standard or by setting up a new working group to develop a grid code specifying a common data format.

DESNZ will provide access to supporting documents. The supplier is responsible for gaining access to existing and emerging standards from international standards development organisations.

## 5. Scope

As in minimum, the review should cover:

- Technical standards both existing and in development
- Within IEC, ISO, CENELEC, ESO, BSI, IEEE, and open standards
- For all data types relevant to the priority use cases (below)

### Priority Use Cases

- 1) Whole energy system strategic planning – enabling:
  - a) The strategic planning roles of NESO including Centralised Strategic Network Planning, Strategic Spatial Energy Planning and Regional Energy System Planning.
  - b) The development of Local Area Energy Plans (LAEPs) by Local Authorities, as described in use case 11 of the Digital Spine feasibility study.  
Note, this use case includes all relevant energy carriers (electricity, gas, liquid fuels, etc.).
- 2) Connections processes – enabling the data sharing required to reduce the timescales for projects to receive grid connections, as set out in the Connections Action Plan.
- 3) Electricity flexibility – enabling the activities required to develop and operate a flexible electricity system, including:
  - a) Investment in flexibility assets.
  - b) Visibility of flexibility assets.
  - c) Deploying flexibility as part of system operation.
  - d) Operating and accessing flexibility markets (building on the Market Standards Study completed by Ofgem).

### Example data types

The below list features some of the data types relevant to the priority use cases. It is provided to support bidders in developing their bids and is not exhaustive. It is expected that the contractor will identify all the relevant data types as part of this study.

- Network topology & constraint data
  - Line voltage measurements
  - Power factors of lines or connections
  - Current on three phases
  - Across transmission, distribution and low voltage network
  - Connection data

- Constraints forecast data, current constraints and congestion data
- inertia
- power flow analysis data
- capacity and outage data
- historical network data
- cost, carbon, security, stability and resilience,
- power factor
- line asset data (voltage measurements, spikes)
- Faults and Outages
  - Voltage spikes (see P28 work)
- Market Data
- System monitoring data
  - Voltage data
  - Current data
  - Thermal data
  - Frequency data
- Carbon Monitoring & Accounting
- Energy balancing data
  - Dynamic energy asset data
- Gas network data
- Energy efficiency data (e.g. that which is held in data.gov.uk)
- Industry wide taxonomies / schemas for energy data
- Energy Demand data
- LAEP data
- Building stock data
- Local Planning Data
- Local consultation Data
- Socioeconomic data
- National datasets
- Market data (financial data, trade data, settlement and dispatch data, Energy cost and availability for a range of energy demand (fixed and flexible))
- Modelling data
  - Peak data
  - Forecast generation data
  - Renewable generation data
  - Forecast load data
  - Asset data
- Time data- how time is represented in measurements of the above

### **Stakeholder Engagement**

The contractor must contact the National Energy System Operator (NESO) to engage with this work. It will be critical to ensure that the project is aligned and complementary to current developments of the data sharing infrastructure. The engagement should be defined to validate the approach taken to fulfil each of the three objectives set out above.

### **Period of Agreement**

This agreement will be in place up Wednesday, 26th February 2025.

**Constraints**

Access to standards both existing and under development from international Standards Development Organisations (IEC, ISO, CENELEC, ESO, BSI, IEEE) will be crucial to the successful completion of this work.

**6. Requirement**

**The following research questions should be answered:**

**Gap Analysis**

RQ1: What data types are required for a data sharing infrastructure to fulfil the Priority Use Cases?

RQ2: Which existing or emerging technical standards are applicable to the data types required for the use cases identified?

This question should be answered by reviewing Information Technology (IT) standards (existing or under development) for generalised data types and data formats within IEC, ISO, CENELEC, ESO, BSI, IEEE, open standards and any other that are deemed relevant to the purpose of this study.

RQ3: For emerging technical standards, what are the technical standards committees developing these and the topography of the standards landscape and the timescales for their completion?

RQ4: What are the objectives and scope of the standards identified?

RQ5: How do the standards identified handle sensitive data (e.g. private data, intellectual property, critical national infrastructure data) to ensure data security and interoperability?

RQ6: What criteria should be used to assess whether the standards identified are suitable for development and how do the standards identify score against each of these criteria?

**Recommendations for Standards Development**

RQ7: Which existing standards can be applied or adapted to fit the data types and use cases, and where do no suitable standards exist? For each data type, recommend one of the below:

- a) Existing or developing standards that are applicable and can be used with little or no development to the standard
- b) Existing or developing standards that are applicable but would require significant adaption
- c) That no suitable standards exist.

RQ8: What steps should be taken next for each of the data types and use cases identified? For each category in RQ5, recommend:

- a) Any steps required to implement the standard in the use case identified.
- b) Development that is required to adapt the standard to fit the data type and use case.
- c) How the identified gaps might be filled (for example by Government sponsoring a new British Standard or by setting up a new working group to develop a grid code specifying a common data format).

RQ9: Which standards, if any, could be developed into a common data standard to address the future needs of the energy sector?

RQ10: What new standards are necessary to support a data sharing infrastructure in the energy sector? What are the recommended next steps for developing a common data standard?

When reviewing standards and making recommendations, please consider development of data sharing infrastructures internationally where relevant.

**We anticipate the supplier to answer the above using a combination of:**

1. **Desk based study and literature review.** This would be used to identify:
  - a) The data types required for the priority use cases.
  - b) Existing and developing standards relating to these data types (note that access to existing and developing standards from international Standards Development Organisations will be essential).
2. **Stakeholder engagement** may be required to:
  - a) Identify standards under development
  - b) Ensure this project is complementary to current work (at NESO and other identified relevant stakeholders).
3. **Gap Analysis.** This is required to compare the standards that would be needed for the use cases with the existing standards, identify gaps, and provide recommendations to fill those gaps.
4. **Reporting.** Writing of a report documenting the findings of the review, gap analysis, and recommendations.

#### **Outputs**

2. A report evidencing the findings and providing recommendations. The report should include, as a minimum:
  - a) A comprehensive list and description of the data types required to deliver the use cases detailed in the scope.
  - b) A description of the standards that have been selected as relevant to the data types identified, with commentary on their objectives. For emerging technical standards, this should include the technical standards committees responsible for their development and the timescales for their completion.
  - c) Recommendations for next steps for each data type based on the gap analysis (e.g. whether existing standards can be applied or adapted or where a new standard is required).
  - d) A recommendation of identified standards that could be further developed into a common standard to address the future needs of the sector, or if no standard has been deemed suitable, a recommendation of next steps.

## **7. Timetable**

- Interim report with data types and standards review to be submitted by 20<sup>th</sup> December 2024.
- Full report including gap analysis and recommendations to be submitted 12<sup>th</sup> February 2025.

Payment Milestones to be discussed and agreed with winning supplier during kick off meeting.

#### **Terms and Conditions**

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

## Section 5 – Evaluation of Bids

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

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

The evaluation team may comprise staff from UKSBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

Do not exceed the page limits specified within each of the Non-Commercial criteria, any additional content provided beyond the specified page limit will not be considered or scored during the evaluation process. Where bidders include a cover page and/or annex, this will be taken into consideration within the page limit and therefore this is discouraged.

Where a Non-Commercial criteria requires an additional attachment such as an organogram or risk register bidders are to note the eSourcing Portal only permits 1 document upload per question therefore bidders must attach their response as a Zip folder.

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW4.3	PPN 01/22 - Contracts with suppliers from Russia or Belarus
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote response received on time within the eSourcing Portal
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

## Scoring criteria

### Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings / scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	10%	10%
Technical	PROJ1.1	Approach / Methodology	90%	20%
Technical	PROJ1.2	Understanding the Project Environment		25%
Technical	PROJ1.3	Ability to deliver (resource and expertise)		25%
Technical	PROJ1.4	Project and Risk Management		20%

## Evaluation of criteria

### Non-Commercial Elements

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

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

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.

60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

#### **Example**

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

**Commercial Elements** will be evaluated on the following criteria.

Price will be evaluated using proportionate pricing (lowest bid / bid \* mark). A bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.

For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:

(Maximum marks available in this example being 12.5)

Bidder A Score =  $50000/50000 \times 12.5 = 12.5$

Bidder B Score =  $50000/80000 \times 12.5 = 7.81$

Bidder C Score =  $50000/100000 \times 12.5 = 6.25$

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.

The lowest score possible is 0.

The scores achieved for the Non-Commercial and Commercial Criteria will be combined to give a bidders total score and ranking.



### Award criteria in the event of a tied place for an award decision

If as a result of the application of the aforementioned scored criteria applicable to Commercial and Non Commercial has been undertaken and suitable due diligence has occurred to ratify this position, this then results in a tied place where more than one supplier has attained a score that is equal to another bidder under this procurement procedures due process, then the Contracting Authority shall make an award decision on the basis of the bidder who provided a bid that attained the highest score under Commercial criteria.

For example:

Bidder A scores 12.50 for Commercial and 45.00 for Non-Commercial

Bidder B scores 15.10 for Commercial and 42.40 for Non-Commercial

The result is a tied place at score of 57.50.

The Contracting Authority stated in its procurement documents that the bidder who scored the highest on under Commercial criteria in a tied place, shall be awarded the contract therefore Bidder B wins the award.

This evaluation criteria will therefore not be subject to any averaging.

## Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> <li>ITQ logged upon opening in alignment with UKSBS's procurement procedures.</li> <li>Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to UKSBS, the Contracting Authority or the eSourcing Portal beyond the bidder control are responsible for late submission.</li> </ul>
Compliance check	<ul style="list-style-type: none"> <li>Check all Mandatory requirements are acceptable to the Contracting Authority.</li> <li>Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.</li> </ul>
Scoring of the Bid	<ul style="list-style-type: none"> <li>Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>The Evaluation team may require written clarification to Bids</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.</li> </ul>
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> <li>To review the outcomes of the Commercial review</li> <li>To agree final scoring for each Bid, relative rankings of the Bids</li> <li>To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the unsuccessful Bidders response</li> </ul>
Due diligence of the Bid	<ul style="list-style-type: none"> <li>the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> <li>Submission of insurance documents from the Bidder</li> <li>Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder</li> <li>Taking up of Bidder references from the Bidders Customers.</li> <li>Financial Credit check for the Bidder</li> </ul> </li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.</li> </ul>

## **Section 6 – Evaluation Response Questionnaire**

Bidders should note that the evaluation response questionnaire is located within the **eSourcing Portal**.

Guidance on how to register and use the eSourcing portal is available at

<https://beisgroup.ukp.app.jaggaer.com/>

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

## Section 7 – General Information

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

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date / time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the Section 3 of the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise the eSourcing portal prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails.
- 7.10 Do complete all questions in the evaluation response questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

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

### DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting UKSBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UKSBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.18 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.19 Do not offer UKSBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed page limits, the additional pages will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via the eSourcing portal. Responses received by any other method than requested will not be considered for the opportunity.

## Some additional guidance notes

- 7.25 All enquiries with respect to access to the eSourcing portal and problems with functionality within the portal must be submitted to eSourcing Helpdesk

**Phone** 08000 698 632

**Email** [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com)

Please note; the eSourcing Portal is a free self-registration portal. Bidders can complete the online registration at the following link:

<https://beisgroup.ukp.app.jaggaer.com/>

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Response Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.

- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.
- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

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

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

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

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

## USEFUL INFORMATION LINKS

- [Contracts Finder](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

## **8.0 Freedom of information**

- 8.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UKSBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UKSBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded 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 UKSBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this ITQ Bidders are agreeing that their participation and contents of their Response may be made public.

## **9.0. Timescales**

- 9.1 [Section 3](#) of the ITQ sets out the proposed procurement timetable. The Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

## **10.0. The Contracting Authority's Contact Details**

- 10.1 Unless stated otherwise in these Instructions or in writing from UKSBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this procurement must be directed through the eSourcing tool to the designated UKSBS contact.



- 10.2 Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Response outside of the eSourcing portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all bidders as to how to submit your Response. Failure to follow this requirement will result in disqualification of the Response.

## Appendix A – Glossary of Terms

TERM	MEANING
<b>“UKSBS”</b>	means UK Shared Business Services Ltd herein after referred to as UKSBS.
<b>“Bid”, “Response”, “Submitted Bid”, or “ITQ Response”</b>	means the Bidders formal offer in response to this Invitation to Quote
<b>“Bidder(s)”</b>	means the organisations being invited to respond to this Invitation to Quote
<b>“Central Purchasing Body”</b>	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
<b>“Conditions of Bid”</b>	means the terms and conditions set out in this ITQ relating to the submission of a Bid
<b>“Contract”</b>	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
<b>“Contracting Bodies”</b>	means the Contracting Authority and any other contracting authorities described in the Contracts Finder Contract Notice
<b>“Contracting Authority”</b>	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
<b>“Customer”</b>	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
<b>“Due Diligence Information”</b>	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
<b>"EIR"</b>	mean the Environmental Information Regulations 2004 together with any guidance and / or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
<b>“FoIA”</b>	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
<b>“Invitation to Quote” or “ITQ”</b>	means this Invitation to Quote documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. <b>NOTE:</b> This document is often referred to as an Invitation to Tender within other organisations
<b>“Mandatory”</b>	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
<b>“Named Procurement person ”</b>	means the single point of contact for the Contracting Authority based in UKSBS that will be dealing with the procurement
<b>“Order”</b>	means an order for served by any Contracting Body on the Supplier
<b>“Supplier(s)”</b>	means the organisation(s) awarded the Contract
<b>“Supplies / Services / Works”</b>	means any supplies/services and supplies or works set out at within <u>Section 4 Specification</u>