



# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of The Department for Business,  
Energy and Industrial Strategy (BEIS)**

**Subject: Gender, Race and Social Inclusion – Net Zero transitions**

**Sourcing Reference Number: CR20141**

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

Registered in England and Wales as a limited company. Company Number 6330639.  
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VAT registration GB618 3673 25  
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Version 4.0

**UKSBS**  
*Shared Business Services*

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# Section 1 – About UK Shared Business Services

## Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our 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.

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

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

## Our Customers

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

UK SBS currently manages £700m expenditure for its Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

## **Privacy Statement**

At UK Shared Business Services (UK SBS) 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 UK SBS 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.ukpbs.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 General Data Protection Regulation (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**

Your personal data will not be processed outside the European Union

## **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 Business, Energy & Industrial Strategy (BEIS)

You can contact the Data Protection Officer at:

BEIS Data Protection Officer, Department for Business, Energy and Industrial Strategy, 1 Victoria Street, London SW1H 0ET. Email: [dataprotection@beis.gov.uk](mailto:dataprotection@beis.gov.uk).

## Section 2 – About the Contracting Authority

### Department for Business, Energy & Industrial Strategy (BEIS)

The Department for Business, Energy and Industrial Strategy (BEIS) was created as a result of a merger between the Department of Energy and Climate Change (DECC) and the Department for Business, Innovation and Skills (BIS), as part of the Machinery of Government (MoG) changes in July 2016.

The Department is responsible for:

- developing and delivering a comprehensive industrial strategy and leading the government's relationship with business;
- ensuring that the country has secure energy supplies that are reliable, affordable and clean;
- ensuring the UK remains at the leading edge of science, research and innovation; and
- tackling climate change.

BEIS is a ministerial department, supported by 46 agencies and public bodies.

We have around 2,500 staff working for BEIS. Our partner organisations include 9 executive agencies employing around 14,500 staff.

<http://www.beis.gov.uk>

## 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	The Department for Business, Energy and Industrial Strategy (BEIS) 1 Victoria Street, London SW1H 0ET
3.2.	Buyer name	Victoria Clewer
3.3.	Buyer contact details	victoria.clewer@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£95,000.00 excluding VAT
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available <a href="#">here</a>. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b>

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Tuesday, 8 <sup>th</sup> December 2020
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Wednesday, 16 <sup>th</sup> December 2020 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Friday, 18 <sup>th</sup> December 2020
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Tuesday, 5 <sup>th</sup> January 2021 11:00
3.10.	Clarifications if required	w/c Monday, 4 <sup>th</sup> January 2021
3.11.	Anticipated notification date of successful and unsuccessful Bids	Tuesday, 12 <sup>th</sup> January 2021
3.12.	Anticipated Contract Award date	Tuesday, 12 <sup>th</sup> January 2021
3.13.	Anticipated Contract Start date	Monday, 18 <sup>th</sup> January 2021
3.14.	Anticipated Contract End date	Thursday, 31 <sup>st</sup> March 2022
3.15.	Bid Validity Period	60 Days

## Section 4 – Specification

### 1. Background

#### Net Zero, Gender, Race and Social Inclusion

The UK is committed to a full transition to a Net Zero future by 2050 and is committed to ensuring that this transition is just and fair. Evidence suggests that women, girls and people in marginalised communities are more vulnerable to the impacts of climate change as a result of structural inequalities, discrimination and sociocultural and economic barriers. The UK is fully committed to facilitating the implementation of the Gender Action Plan agreed at COP25, both domestically and internationally. We welcome the steps taken so far by Parties, non-Party stakeholders and the UNFCCC Secretariat to deliver on the enhanced UNFCCC Gender Action Plan and continue to call on all countries to develop gender-responsive climate policies, plans, strategies and actions. As Presidency, we recognise the importance of prioritising gender-responsive climate action and finance in order to tackle possible uneven gender-relations which may exacerbate the damaging effects of climate change (and climate change mitigation action) on women and girls.

The role of gender, race and other protected characteristics (such as disability and socio-economic) and intersectionality in energy systems needs to be considered as the UK and other countries move towards Net Zero. Research has shown that norms and practices linked to gender and race have an impact on the development of policies, user systems and energy technologies, and recognising these can lead to more efficient and inclusive energy solutions<sup>1</sup>. One central issue is that, often energy policies and technologies are assumed to be gender neutral when, in fact, evidence suggests they may be gender blind<sup>2</sup>. Similar evidence is emerging as to the same effect for other protected characteristics. This means that it is important that energy and climate policies explore possible differential impacts on genders as well as socio-economic and cultural groups. Championing women's roles as technology users is essential if we are to deliver effective, long-term solutions to climate change, including climate change mitigation and adaptation strategies. Without doing this policies and technologies risk being less effective and may have unintended effects, hindering transitions to more sustainable energy systems.

For example, reducing domestic energy consumption is a critical part of the UK's transition to Net Zero. Women are the main users and drivers of domestic energy demand<sup>3</sup>. Early evidence suggests that women are more conscious consumers and typically report being more willing to change their energy related behaviours than men<sup>4</sup>. However, they face

<sup>1</sup> Berka, A. L., MacArthur, J. L., & Gonnelli, C. (2020). Explaining inclusivity in energy transitions: Local and community energy in Aotearoa New Zealand. *Environmental Innovation and Societal Transitions*, 34, 165–182. <https://doi.org/10.1016/j.eist.2020.01.006>

<sup>2</sup> Strengers, Y. (2014) Smart Energy in Everyday Life. Are You Designing for Resource Man? *Interactions*, July-August, 2014

<sup>3</sup> Standal, K., & Winther, T. (2016). Empowerment Through Energy? Impact of Electricity on Care Work Practices and Gender Relations. *Forum for Development Studies*, 43(1), 27–45.

<sup>4</sup> Clancy, J.S. & Feenstra, M. (2019), Women, Gender, Equality and the Energy Transition in the EU, FEEM.



several barriers to being early adopters of technology. Upscaling of energy transition solutions are likely to be more effective if better techniques are used to incorporate the perspective of those with protected characteristics. A deeper understanding of this pattern of energy demand feeding in to gender-responsive and socially inclusive policies could accelerate the domestic energy/climate transition. Additionally, gender perceptive analysis will shed light on other protected characteristics and on issues associated with intersectionality, ensuring the UK's transition is fair and equal across the board.

Across the world evidence has suggested that institutional contexts that shape possibilities for socio-technical innovation in energy are often not diverse and this can contribute to lower understanding of a diverse range of energy users. This in turn can risk lead to sub-optimal interventions that have lower impact, effectiveness, and value for money. Investment in tools and practices is needed to change and counter-act the barriers in the energy sector that inhibit gender responsive and socially inclusive energy interventions. Most research to date has been done in low- and middle-income countries with little knowledge transfer occurring in high-income nations. There is a need to for greater data and scientific research on gender, race, socio-economic status and disability and energy use in the UK.

BEIS has processes in place to ensure that equalities impacts are considered in the design of all of its policies, as required by law in the Public Sector Equality Duty set out in the Equality Act (2010). Our commitment to this cause goes far beyond our legal duty so we are looking for an ambitious and innovative programme of work as we endeavour to deliver a just and effective transition to a Net Zero society.

#### **International Energy Agency's Users Technology Collaboration Platform:**

The UK is a contributing member of the International Energy Agency's (IEA) Users Technology Collaboration Platform (UsersTCP)<sup>5</sup>. The User-Centred Energy Systems mission is to provide evidence from socio-technical research on the design, social acceptance and usability of clean energy technologies to inform policy making for clean, efficient and secure energy transitions. The group supports the work of independent, international groups of experts that enable governments and industries from around the world to lead programmes and projects on a wide range of energy technologies and related issues. The experts in these collaborations work to advance the research, development and commercialisation of energy technologies. The breadth of the analytical expertise in the Technology Collaboration Programme is a unique asset to the global transition to a cleaner energy future. These collaborations involve over 6 000 experts worldwide who represent nearly 300 public and private organisations located in 55 countries.

The UsersTCP has announced a new annex for January 2021. This new research collaboration is entitled: *Empowering all: Gender in policy and implementation for achieving transitions to sustainable energy*<sup>6</sup>. It will gather researchers from the fields of

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<sup>5</sup> <https://userstcp.org/>

<sup>6</sup> <https://userstcp.org/annex/gender-energy-annex/>

gender and energy in a global network to analyse energy policy and technologies from gender perspectives and provide recommendations for policy design and implementation.

The aim of this international collaboration is to apply gender perspectives to support the participating countries in their work to design a more efficient and inclusive energy system, and through this also support ongoing efforts to foster energy transitions. This is particularly pressing now, as countries develop measures to mitigate the social and economic costs of the current COVID-19 crisis. This tender will also constitute the UK's participation in this international collaboration. In particular, the UK (and the UsersTCP) recognises that this annex provides an opportunity to use gender as a lens to explore the energy system from a wider diversity and inclusion perspective and thus other protected characteristics that produce vulnerability, such as race, disability and social inclusion are also central to this work.

This tender provides a unique and exciting opportunity to work closely and collaboratively with BEIS, other interested government departments e.g. Cabinet Office, and with researchers and policy makers across the OECD. Most notably, this includes Sweden, Ireland, Austria and the Netherlands. This project may benefit from a considerable amount of international profile and is likely to benefit from the possibility of being showcased at COP26.

The core focus of this tender is to support an inclusive transition to net zero in the UK. The new Users TCP annex provides a unique opportunity and mechanism to learn and collaborate from other countries in this area.

## **2. Aims and Objectives of the Project**

### **Aims and objectives:**

The overall objective of Stage 1 is to identify how the UK can better develop gender responsive and inclusive climate/ energy policies and technologies. Sub-objectives can be identified by the research's stage:

### **Stage 1: Initial Review of Evidence/Data and Scoping.**

This can be broken down into 5 objectives:

1. Identify existing knowledge (and data) on users (with a particular focus on those with protected characteristics) of policies and technologies for energy efficiency, low carbon heating and other climate policies in the UK.
2. Identify existing evidence regarding best practice for mainstreaming gender and social inclusion into the development of policy and technologies for climate mitigation/energy that is relevant for the UK (and other developed countries).
3. Identify the where there are opportunities to better embed gender and social inclusion into energy/climate policy making and innovation processes.
4. Identify how the UK and other countries can work together to better develop gender responsive climate/energy policies and technologies for Net Zero transitions.
5. Clearly scope out a plan for the second phase of the work – particularly practical intervention(s) or tools that will build on and operationalise the learning produced from answering the research questions in Stage 1.

The outputs from Stage 1 will include: i) a publishable review of the literature/evidence (this may include some light touch secondary data analysis if relevant); and ii) a clear plan for Stage 2 of the work that sets out a proposed programme of work. This will provide the basis for reviewing whether the contract proceeds into Stage 2 or whether a break clause at the end of March 2021 will be initiated.

### **Stage 2: Developing a practical approach to support inclusive energy/climate policy and technology**

The objectives for Stage 2 will need to be informed by the learning produced by the delivery of Stage 1's objectives. It is imperative that Stage 2 is based on the evidence base identified in Stage 1. However, the broad overarching objectives for the Stage 2 workstream are:

1. Deliver and implement a toolkit, strategy or methodology that operationalises the learning and evidence identified in Stage 1 that fills government's knowledge gaps and empowers existing processes with a better understanding of the 'User'. These will need to offer clear potential and supporting an inclusive energy/low carbon transition.
2. To ensure shared learning across the participating countries of the UsersTCP and external stakeholders.

Bidders should expect to work with BEIS to refine and develop these objectives as part of the design process for Stage 2.

#### **Proposed research questions:**

##### **Stage 1, Defining, identifying and framing the problem.**

1. What does gender-responsive and inclusive technology/policy mean?
  - a. Why are gender-responsive/ socially inclusive technologies and policies important? What value could they bring for climate mitigation and the energy sector?
2. What do we already know about women and those with other protected characteristics as users of energy products, technologies and policies?
  - a. What gendered roles exist? How are these reflected in the inertias of the energy sector in the UK?
  - b. What are the main gender-related issues with current policy making and approaches related to achieving net zero in the UK?
  - c. Of what importance is the consideration of other protected characteristics and intersectionality?
  - d. What do gender equality and social inclusion (GESI) approaches say about technology in the energy sector in the UK?
3. How can the UK best collaborate with other countries (through the Gender Annex of the Users TCP) to develop gender-inclusive policies and technologies?
4. What opportunities and practical approaches exist that could support the development of gender-responsive and socially inclusive technologies and policies? (where relevant) How might these be developed and undertaken as part of stage 2?

##### **Stage 2, Developing and implementing a practical approach.**

(to be determined/further refined if the contract continues past the 31<sup>ST</sup> March 2021 break clause)

5. What methods and approaches exist for data collection with hard to reach groups, for example BAME communities and female users of technology in male headed households?
  - a. What best practice exists for a gender-sensitive and socially inclusive understanding of users in energy?
  - b. In which countries might best practice case studies exist?
6. What approaches exist for developing (mainstreaming) gender-responsive policies and technologies in energy/climate?
  - a. What policy levers exist for promoting gender-inclusive technology?

Please note that as this is a culmination of BEIS' early thinking on this relatively new area of research and as such we are open to suggestions and refinements to these research questions.

### **3. Suggested Methodology**

The maximum budget for Stage 1 is £30k.

#### **Stage 1: Literature review**

A systematic-like literature review of the existing evidence on a gender-responsive and socially inclusive transition to Net Zero, this includes technologies and policies for energy efficiency, low carbon heating and other areas of the energy/climate system.

The literature review should identify, select and critically appraise existing research. It should be conducted in an applied manner and must define the lessons that can be learnt from the existing literature and applied to BEIS' specific policies for an inclusive Net Zero transition. There may be scope to conduct virtual interviews or workshops with experts to validate the findings of the literature review and/or carrying out basic, light touch analysis of relevant dataset(s). The review should also identify what best practice exists for ensuring policy and technology development is gender responsive and socially inclusive as well as what evidence gaps exist. Whilst the primary focus of the literature review is on gender-responsive technology and policies in the energy sector specifically, the review should consider what can be learnt from the wider literature on gender-responsive/ socially inclusive innovation and technology development in other sectors that have undergone socio-technical transitions.

This review is focussed on **users** of climate/energy technologies and policies. Therefore, it is out of scope to consider diversity in the energy sector itself. Lots of research has been done in this area and there is a consensus that the energy sector needs to improve the diversity of its workforce.

Key sources for the review should include (this is not an exhaustive list): literature on the UK energy systems, literature on other developed countries, literature in an LMIC/ international development context including donors and funders, existing policies and documents from within the energy industry, literature on gender and social inclusion in policy making and socio-technical transitions. Bidders should detail examples of their proposed search terms and search strategies in their response.

To facilitate developing the literature review in an applied manner, close working with BEIS colleagues is essential and bidders should provide detail on their approach to this in their response. The literature review will require collaboration with the IEA's gender annex working group where an established community of practice will be well placed to support the development of this literature review and the design of Stage 2 based on this.

At the end of Phase 1 a publishable literature review should be produced that identifies and defines the problem and scopes/summarises the potential approaches that could be utilised by BEIS to overcome this.

It will be imperative that all research and reporting is carried out in plain English and accessible to a range of non-specialist audiences – the written use of complex concepts and terminologies should be minimised.

## **Project plan for Stage 2**

The literature review should include an Annex that operationalises this in the form of a project plan for Stage 2. This should be produced using close engagement by the successful bidder to help define what would be of most value for BEIS in this area. There will be a **break clause** at this point (March 2021) and continuation will be contingent on both BEIS securing the funding and BEIS approving the project plan for Stage 2. Key criteria for pursuing Stage 2 will be agreed over the course of Stage 1 with the successful bidder but the proposal for Stage 2 will need to have to be practical, useful and have clear potential to help support inclusive energy/climate policy.

BEIS understands the importance of Stage 2 being built from the evidence base established in Stage 1. Bidders should detail how they intend to take the findings of the literature review as they emerge to design an applied tool for BEIS that will be useful and impactful in the department. Therefore, we are interested in the process that bidders will use to ensure that learning from Stage 1 is transferred into action. For the purpose of the procurement exercise bidders should take what they know from the area and discuss an example output that might be relevant for Stage 2. This could include exploring the use of case studies in countries identified as leaders in this area. It might be possible to facilitate this through BEIS' Official Development Assistance funded projects through International Climate Finance or the Global Challenges Research Fund but this should not be relied upon.

## **Stage 2: Development of a practical solution**

(If contract continues beyond the break clause)

We are looking for an actionable solution (e.g. a toolkit, methodology, possible strategy etc) to use within policy processes to ensure that policies and technologies for the UK's Net Zero transition are gender-responsive. We expect that this will involve working iteratively and collaboratively with BEIS and other stakeholders as well as involving some form of testing and piloting.

In order to provide an accurate pricing schedule to facilitate the evaluation of all bids, tender responses should include a suggested solution based on existing knowledge and a corresponding work plan to fulfil Stage 2. All costings and price schedules should reflect this work plan for Stage 2.

## **Working with BEIS**

The BEIS point of contact for this project will provide support for identifying opportunities for engagement with key stakeholder and policy teams. Bidders should think about how

they will work collaboratively with BEIS to understand how best to deliver the maximum value for the department from this project.

#### **Working with the UsersTCP Gender Annex:**

The successful bidder will be required to attend meetings of the UsersTCP working group (which will be once every two months) as well as engage with ad hoc email requests. Beyond this, it is for the successful bidder to decide how best to utilise and engage with the group. The successful bidder will act as an intermediary between this group and BEIS, this will include providing a readout from meetings and identifying opportunities to benefit from participation in the group.

#### **4. Deliverables**

**1. Weekly or bi-weekly progress reports,**

These weekly progress reports should take the form of a short email and will be discussed in a weekly or bi-weekly catch up meeting with the BEIS point of contact. This will provide an opportunity to set direction for the review, aid idea formation for Stage 2 and identify opportunities for collaboration with BEIS policy and analytical teams.

**2. Interim literature review findings presentation, (mid/late) February 2021**

A presentation to a wide range of BEIS stakeholders detailing the early findings of the literature review as well as the approach taken to defining key terms. The presentation should be 30 minutes long with an additional 30 minutes for questions. This will allow BEIS influence the direction of the literature review towards areas of a particular interest.

**3. Final literature review for peer review, (end) March 2021**

This should be of a publishable standard<sup>7</sup> and will be quality assured by BEIS analysts and subject to BEIS' peer review process.

**4. Proposal for Stage 2, (mid) March 2021**

The successful bidder must produce a proposal for a toolkit/methodology/strategy that they will deliver for BEIS to ensure that the learning from Stage 1 is integrated into policy-making and innovation processes for climate mitigation and energy. A clear rationale should be produced and it must demonstrate how this has been built addresses an issue or evidence gap identified in Stage 1. This must include timescales, budget and work plan for the project's delivery. This should be included as an Annex to the literature review but will not be peer reviewed or published.

BEIS will assess the annex, according to the criteria agreed in the inception meeting, before the break clause in March 2021. If the proposal is not accepted by BEIS, or funding cannot be secured, the break clause will be implemented in March 2021.

**5. Workshop, October 2021**

This workshop will provide an early opportunity to disseminate the output of Stage 2 and could also be used as a means of piloting the output with government and external stakeholders. This is timed to build on the momentum of COP26 and its contribution to the Gender Action Plan. It may be possible to incorporate/show case this at events around or at COP26 but this is not clear at this stage.

**6. Stage 2 Output**

This output will be the culmination of the entire research project. This will need to be agreed at the end of stage 1 prior to proceeding with Stage 2. It will be BEIS-owned although could be used across government and should complement BEIS's existing processes. The output will need to have a clear, tangible impact in helping to support an inclusive energy/low-carbon transition.

<sup>7</sup> Guidelines for publishing on gov.uk and on Government Social Research standards can be found here:

**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 model

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

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

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

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

Pass / Fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	SEL2.12	General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Maximum Budget
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
-	-	Invitation to Quote – received on time within e-sourcing tool
	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.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20.00%
Quality	PROJ1.1	Methodology/Approach	40.00%
Quality	PROJ1.2	Understanding the Project Environment	10.00%
Quality	PROJ1.3	Staff to Deliver	15.00%
Quality	PROJ1.4	Project plan and Timescales	15.00%

## Evaluation of criteria

### Non-Price elements

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

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

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

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

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 selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.

100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.
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All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

**Example**  
 Evaluator 1 scored your bid as 60  
 Evaluator 2 scored your bid as 60  
 Evaluator 3 scored your bid as 40  
 Evaluator 4 scored your bid as 40  
 Your final score will  $(60+60+40+40) \div 4 = 50$

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

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

For example - Bid 1 £100,000 scores 100.  
 Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80  
 Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.  
 Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.  
 Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.  
 Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.  
 Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

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

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

## **Section 6 – Evaluation questionnaire**

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

Guidance on how to register and use the e-sourcing portal is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

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

## Section 7 – General Information

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

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in 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 e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the Delta 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 and fax details.
- 7.10 Do complete all questions in the 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 UK SBS 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 UK SBS 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 UK SBS 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 word counts, the additional words 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 e-sourcing tool. 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 e-sourcing tool and problems with functionality within the tool must be submitted to Delta eSourcing, Telephone 0845 270 7050
- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered 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 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 Delta 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 60 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 Delta 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 Delta 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 introduced its new Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. 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](#)
- [Tenders Electronic Daily](#) # [ ~~do~~ only leave in if the ITQ is going to be treated like a Full Above threshold procurement] #
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)