Invitation to Quote

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

Subject: GO-Science Emerging Technology Taxonomy Project

Sourcing Reference Number: PS21223

UK Shared Business Services Ltd (UK SBS)
www.uksbs.co.uk

Version 8.0

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.

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- 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

<u>Privacy Notice</u>

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

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.

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, 1 Victoria Road, London, SW1H 0ET
3.2.	Buyer name	Joe Wightman
3.3.	Buyer contact details	Professionalservices@uksbs.co.uk
3.4.	Estimated value of the Opportunity	£110,000 over 2 Lots – £60,000 for Lot 1 and £50,000 for Lot 2.
3.5.	Process for the submission of clarifications and Bids	**All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available here.** **Please note submission of a Bid to any email address including the Buyer will result in the Bid not being considered.**

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Tuesday, 23 November 2021 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Tuesday, 30 November 2021 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Friday, 03 December 2021 11:00
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Monday 13th December, 2021 11:00
3.10.	Date/time Bidders should be available if face to face clarifications are required	N/A
3.11.	Anticipated notification date of successful and unsuccessful Bids	Tuesday 4th January, 2022
3.12.	Anticipated Contract Award date	Tuesday 4th January, 2022
3.13.	Anticipated Contract Start date	Friday 7th January 2022
3.14.	Anticipated Contract End date	Thursday, 31 March 2022

3.15.	Bid Validity Period	60 Days

Section 4 – Specification

1. Introduction and summary of requirements

The Government Office for Science, part of the Department for Business, Energy and Industrial Strategy (the Authority) is developing a classification system for emerging technology in order to:

a. facilitate better understanding of the relationships and linkages between technologies
b. reduce confusing conversations around semantics when discussing technologies – aiding joined up work on tech across Government
c. provide an indexing structure for our library of reports and other Emerging Technology (EmTech) products.

Mission Statement:

The mission is to develop a light-touch and flexible system of categorising technologies, and the relationships between them, to facilitate the sharing of insights across Government. This taxonomy needs to:

- include definitions and search terms for 150 – 200 priority technologies that are currently of interest to x-HMG stakeholders. The Authority will provide a provisional list of technologies and definitions, and would welcome suggestions of additional candidate technologies for inclusion by the provider.
- be 'application agnostic'. The Authority considers technologies through multiple policy lenses. Exclusion of information on specific applications of when defining technologies will mean outputs are relevant to a wide range of policy teams, and will mitigate bias towards any specific technology applications or departmental interests.
- comprise a schema that flexibly accommodates a broad array of cross-government technology interests.

The project will also describe the relationships (e.g., enabling links) between technologies, their applications, and links back to fundamental science. Construction of these rich semantic relationships will allow stakeholders to rapidly understand the landscape surounding specific technology areas, facilitating better policy development in this space. The Authority would like to explore the adoption an existing classification schema for the Science/R & D layer (RTIC Data City classifications, Fields of Research[1]). The taxonomy will be integrated with the Authority's EmTech web application, accessed by civil servants only, in a Linked Data format.

Overall Requirement: the Authority requires two types of support that will be advertised as **two separate lots**. Suppliers who can deliver one or both lots are encouraged to submit a bid.

LOT 1: Elicitation of Subject Matter Experts (SMEs) to help define, classify and relate a longlist of emerging technologies

LOT 2: Provision of semantic web and taxonomic expertise

2. Background

Science and Technology is currently a high priority policy area across Whitehall. For example, the recent Integrated Review placed Science & Technology at the heart of the Governments vision for the UK's role in the world for the next decade, and leading to the formulation of the

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[1] https://dimensions.freshdesk.com/support/solutions/articles/23000018826-what-is-the-background-behind-the-fields-of-research-for-classification-system-

National Science and Technology Council chaired by the Prime Minister. Whilst the number of teams working on technology policy is rapidly increasing, this has created new challenges in ensuring consistency and join-up across teams and departments. The Authority's Emerging Technology team's objectives are to:

a) Provide a centralised technology scanning service
b) Support better decision making with data and analysis
c) Strengthen cross government collaboration on EmTech

One specific barrier to achieving these goals is language. Currently, the lack of a standardised classification system for technologies across Whitehall is resulting in confusion around semantics when discussing technology policy issues, particularly within non-specialist policy teams. This issue also compounds a lack of interoperability between x-HMG technology work (horizon scanning, reports, data, analytical work) as well as potential effort duplication.

With departments focussing on specific technologies and applications to meet their policy objectives, the Authority's cross-cutting perspective of the Whitehall technology ecosystem enables these pervasive issues to be addressed. The Authority has strong relationships across Whitehall, and has had **significant buy in from a diverse pool of stakeholders to develop a standardised classification system for emerging technology**. The upcoming release of a new EmTech web application and insights dashboard (a tool for x-hmg customers to obtain data and insight on specific technologies) provides an ideal platform to publish this new classification system – providing a semantic reference point for HMG departments to map technology work to. The taxonomy will be used to index all of the resources hosted on the platform, enabling users to search and retrieve all relevant material related to a specific concept.

The Authority investigates emerging technologies through multiple policy lenses (e.g. national security & defence, environment, finance, health etc.) to ensure products and analyses are accessible to a broad range of policy 'customers' across Whitehall. The Authority is therefore looking to develop an 'application agnostic' taxonomy to mitigate bias towards specific policy areas.

3. Aims and Objectives

Project Aim:

To develop a light-touch and flexible system of categorising technologies, and defining the relationships between them, to facilitate the sharing of insights across Government**.**

Objectives:

1. Facilitate the understanding of links between technologies, between technologies and their applications, and fundamental science – primarily using a knowledge graph approach

2. Enable products and information from different departments to be linked together in a standardised way – reducing duplication and improving consistency

3. Inform search strategies for gathering data about technologies from external sources (e.g. publication data, patent analysis, public literature, data on funding rounds for technology companies)

4. Inform horizon scanning methods for new technologies through the identification of converging technology areas

5. Reduce distracting conversations around semantics when engaging with stakeholders

6. Provide a schema to index a EmTech library of reports, and tag documents with specific concepts

Glossary of terms

EmTech	Emerging Technology
GO-Science	Government Office for Science, part of BEIS, "the Authority".
EmTech web application	An internal web platform currently being built by the Authority to host a range of resources and data, and enable insight sharing across government. This application is being hosted on Gov.uk PaaS.
Gov.uk PaaS	A cloud hosting solution for public sector digital services - a shared platform that civil service teams can use to quickly and safely host their applications in the cloud.
SME	Subject matter expert
GO-Science longlist	A draft list of roughly 150 priority technologies produced by the Authority that will form the basis of the concepts of the taxonomy
Candidate technologies	Technologies not listed on the GO-Science longlist that the service provider SMEs (Lot 1) believe are fundamental and should be included in the taxonomy

Specific Requirements for Lots 1 and 2

LOT 1: Elicitation of subject matter experts (SMEs) to help define, classify and relate a longlist of emerging technologies.

Lot 1 Requirement:

In order to produce a robust, futureproof and representative product, the Authority requires access to a broad array of subject matter expertise (in emerging technology) to provide support in building the taxonomy. The service provider will be tasked with classifying technologies in the following areas (including but not limited to):

- Digital Infrastructure
- New Computing Technologies
- Artificial Intelligence & Machine Learning
- Quantum Technologies
- Advanced Materials & Manufacturing
- Energy Systems (production, distribution and management)
- Engineering Biology
- Bioinformatics
- Human Augmentation
- Photonics
- Nanotech
- Batteries
- Robotics
- Smart Machines
- Next-gen Transport & Aerospace

LOT 2: Provision of semantic web and taxonomic expertise

In order to produce a robust, futureproof and accurate product – the Authority requires technical semantic web and taxonomic expertise to provide support during the development and deployment of the controlled vocabulary for integration with the EmTech web application

4. Overall Project Methodology

The proposed project steps are set out in the table below. More details on specific tasks and outputs can be found in the Tables below.

T1. Project Planning & Management

T2. Knowledge Engineering

T3. Taxonomy Development

T4. Management Plan Development

T5. Internal Workshops

Repeat T3 – T5 for each technology area

T6. Iteration and Write Up

T7. Translation of taxonomy into machine readable format – LOT 2 ONLY

T8. Integration & Publication – LOT 2 ONLY

T9. Follow Up & Call Off Work

Table 1. Breakdown of specific tasks that will be required from service providers bidding for Lot 1.

Task	Description	Outputs (see table 2 for a detailed description of the required outouts)
T1. Project Planning & Management	Lead on project management with support from service provider for Lot 2, and the Authority's project manager, to develop an agile process to deliver project outputs. Service providers for both lots will be expected to attend: 1) Weekly meetings with project managers from the Authority. (30 mins) 2) Monthly progress meetings with the Authority to advise on progress deliverables, spend profile, risks (and opportunities) as defined in the scope.(60 mins)	**L1-A. Project Plan**
T2. Taxonomy Management Plan Development	Support Lot 2 service provider in designing mechanisms to futureproof the taxonomy against the pace of innovation in this space (considering concept addition and retirement).	None required
T3. Knowledge Engineering	Support Lot 2 service provider in data modelling through provision of general knowledge and understanding of the EmTech ecosystem.	None required
T4. Taxonomy Development	Elicitation of groups of SMEs for defining, classifying and relating specific technologies from the Authority's longlist, as well as identifying potential new candidate technologies for agreement with the Authority. Collection, storage, sharing (with the Authority) and disposal of SME contact details in accordance with GDPR.	**L1-B. Paper summarising provisional definitions, relationships and classifications with accompanying presentation for T5.**

T5. Internal Workshops	Organisation and presentation of initial outputs to key government stakeholders to promote feedback and elicit discussion. *Due to the complex and interconnected nature of concepts, service providers will need to think creatively about how they can present their findings to HMG stakeholders in an informative and engaging way.*	**L1-C. Agenda, presentation and summary of workshop feedback and any revisions made to L1-B.**
T6. Iteration & Write Up	Revision and amendment of L1-B based on HMG stakeholder feedback – may require several versions. Write up of finalised findings for each technology area.	**L1-D. Written reports summarising the findings of the work for each technology area/SME group** **L1-E. Master report and glossary**
T7. Translation of taxonomy into machine readable format	No involvement	None required
T8. Integration and publication	No involvement	None required
T9. Follow Up & Call Off Work	Service provider will be expected to accommodate any clarification questions and corrections the Authority may have regarding the outputs. Separately, the service provider should specify and set aside an agreed budget and day rates for additional unforeseen call off work of up to 10 days during the contract.	To be agreed and authorised as needed during the project

Project management considerations for service providers bidding for Lot 1

Tasks T3 (Taxonomy Development), T4 (Internal Workshops) and T5 (Iteration & Write Up) will be repeated for each technology area, of which it is estimated there will be around 10 – 12. Each technology area is comprised of between 5 – 10 technologies (or concepts). **It will be up to the service provider for Lot 1 to determine how best to 'bucket' these tech areas into SME groups to optimise efficiency and budget whilst retaining sufficient expertise to deliver a high-quality product.** The Authority recommends an agile, timeboxing approach to the project based on the sensitive timeline and the clear opportunities to parcel up this work.

Seeing as the Authority consider technologies at quite a high level (see below), elicitation of generalists within the domain of 'quantum technologies' would be more appropriate than highly

specialised individuals operating in esoteric areas of this field. Example of the type and level of granularity with which the Authority looks at technologies, their applications and the areas of science they relate to.

Tech Area: Quantum Technologies

Component Technologies: Quantum clocks, quantum sensors, quantum carbon dots, quantum simulators, quantum computers, quantum repeaters, quantum internet

Applications (Quantum clocks): PNT, financial transaction security

Area of fundamental science (Quantum clocks): Quantum mechanics, atomic physics

Table 2. Specific outputs for service providers for Lot 1

Reference Code	Output	Description
L1-A	**Project Plan**	Pipeline demonstrating expert elicitation process, milestones and agreed chronology of SME groups/tech areas
L1-B	**Paper summarising provisional definitions, relationships and classifications with accompanying presentation for T5.**	Short papers (max 3 pages) summarising provisional technology definitions, relationships, classifications and search terms that have been developed by SMEs (**L1-D**). These should be presented in a clear and concise fashion that is easily translated into a SKOS representation. Brief presentation explaining methodology and running through decision making process for technology classification and relationship mapping. The service provider should alert the Authority to any potential 'candidate technologies' for addition to the taxonomy at this stage. This will allow for more streamlined integration of new concepts. The Authority will then accept/reject proposed candidates based on consultation with policy teams and in house data analysis. An excel spreadsheet containing contact details of SMEs involved in taxonomy development.
L1-C	**Summary of workshop feedback and any revisions made to L1-B.**	Two page summary of feedback from xHMG workshop attendees, and details of any amendments made to the taxonomy during the iteration process (to be reviewed in conjunction with the Authority Project Manager)
L1-D	**Written reports summarising the findings of the work for each**	Written reports including: a) A glossary of terms describing each technology

	technology area/SME group	b) A classification system denoting how technologies are grouped hierarchically
		c) Details of how technologies in this technology sector relate to each other, and other technologies in the wider taxonomy. Specific types of relationships will be confirmed by the Authority after contract award but will include both SKOS properties and custom terms (see Annex I).
		d) A comprehensive list of search terms for each technology, to enable the Authority to effectively query quantitative data sources
		e) A list of Dimensions Field of Research (and potentially Data City RTIC) codes, relevant to each technology
		These reports should be concise, containing no more than a paragraph per technology. Links to source material should be provided
L1-E	**L1-E. Master report and glossary**	All individual reports to be grouped into a single pdf document with introduction, executive summary and brief annexed methodology A separate master glossary of all described technologies should also be provided in pdf format.

Table 3. Breakdown of specific tasks and outputs that will be required from service providers bidding for Lot 2

Task	Description	Output (see table 4 for a detailed description of the required outouts)
T1. Project Planning & Management	Support service provider for Lot 1 (project management lead) in developing agile project plan to deliver required outputs. Service providers for both lots will be expected to attend: 1) Weekly meetings between project managers from the Authority. (30 mins) 2) Monthly progress meetings with the Authority to advise on progress deliverables, spend profile, risks (and opportunities) as defined in the scope.(60 mins)	None required

T2. Management Plan Development	Development of a long-term management plan to futureproof the taxonomy against the pace of innovation in this space (considering concept addition and retirement, and day-to-day upkeep).	**L2-A. A written report describing the agreed long-term management plan for the taxonomy**
T3. Knowledge Engineering	Development of data model for the taxonomy, considering the technical requirements of deployment and nature of the subject area.	**L2-B. A conceptual diagram of the finalised data model**
T4. Taxonomy Development	Provision of taxonomic oversight to SMEs when developing the taxonomy, to ensure outputs are robust and compatible with W3C Linked Data standards.	None required
T5. Internal Workshops	Provision of support to SMEs when presenting findings to internal stakeholders during internal workshops, and guidance on discussions on amendments with taxonomic rigour in mind	None required
T6. Iteration & Write Up	Revision and amendment of L1-B based on HMG stakeholder feedback – may require several versions	None required
T7. Translation of taxonomy into machine readable format	Writing up of taxonomy in SKOS/RDF format for ingestion into the EmTech web application.	**L2-C. Machine-readable version of the taxonomy**
T8. Integration and Publication	Provision of strategic oversight and technical assistance during taxonomy deployment into the EmTech web application (built in-house by the Authority's analytical team and hosted on GOV.UK PaaS).	None required
T9. Follow Up & Call Off Work	Service provider will be expected to accommodate any clarifications questions or corrections the Authority may have regarding the outputs. Separately the service provider should specify and set aside an agreed budget and day rates for additional unforeseen call	To be agreed and authorised during the project

| | off work of up to 10 days during the contract. | |

Table 4. Specific outputs for service providers for Lot 1

Reference Code	Output	Description
L2-A	**A written report describing the agreed long-term management plan for the taxonomy**	a) This report should detail standard operating procedure for the following processes: i. Triage/addition of new technologies to the taxonomy ii. Retirement of concepts iii. Day-to-day maintenance of the taxonomy The report should be no longer than 6 pages
L2-B	**A conceptual diagram of the finalised data model**	A visual representation of the taxonomic schema for dissemination across government.
L2-C	**Machine-readable version of the taxonomy**	A SKOS representation of the conceptual and finalised relationships between technologies defined by SMEs during taxonomy development (T3 – T5) to enable integration into the EmTech web application. **At this stage, the Authority is only looking to integrate the 'technology' layer into the web application in Linked Data format. Data on applications and links to science will most likely not be translated into a Linked Data format.**

5. Ownership and Publication

All products and intellectual property developed during the project will be owned by Her Majesty's Government. The Authority may publish some non-sensitive aspects of the taxonomy (such as the glossary) on Gov.uk in due course.

6. Quality Assurance

To ensure deliverables for both lots are achieved and outputs are of a high quality, service providers should demonstrate internal mechanisms in place to ensure this (e.g., ISO 9000 certification). For organisations who do not hold ISO 9000 certification, a clear description of specific and robust quality management systems equivalent to the certificate should be clearly stated. In addition, service providers should ensure that project personnel involved hold appropriate levels of professional experience and competence for the tasks assigned, with clear processes for technical and quality checks on outputs.

7. Challenges

Key challenges of the project identified by the Authority:

1. Outputs of research become redundant due to the rapid rate of change in this sector
2. Outputs not deemed fit for purpose by internal stakeholders
3. Project management across multiple organisations
4. Elicitation of sufficiently broad expertise at pace
5. Delivery of outputs at pace
6. Balance of detail (service providers understanding the 'broad and shallow' focus of the Authority, and proposing an agile solution to reflect this)

8. Ethics

All applicants will need to identify and propose arrangements for initial scrutiny and on-going monitoring of ethical issues. The appropriate handling of ethical issues is part of the tender assessment exercise and proposals will be evaluated on this as part of the 'addressing challenges and risks' criterion.

We expect contractors to adhere to the following GSR Principals:

1. Sound application and conduct of social research methods and appropriate dissemination and utilisation of findings
2. Participation based on valid consent
3. Enabling participation
4. Avoidance of personal harm
5. Non-disclosure of identity and personal information

9. Working Arrangements

The successful contractor for each lot, or for a combined lot contract will be expected to identify a named point of contract through whom all enquiries can be filtered. The Authority will assign a project manager to the project who will be the central point of contact. **This project is being developed in collaboration with Innovate UK. The contractor(s) will be working closely with key stakeholders across government, as well as with each other. Meetings and presentations will take place remotely (via MS Teams or similar) unless stated otherwise.**

10. Skills and expertise

The Authority would like you to demonstrate that you have the skills and capabilities to undertake the project. Your tender response should include a summary of each proposed team members expertise and capabilities.

Contractors should propose job titles of the project team and include the tasks and responsibilities for each role. This should be clearly linked to the work programme, indicating the grade/ seniority of role and number of days allocated to specific tasks. Contractors should not identify the individual(s) who will be responsible for managing the project.

11. Consortium Bids

In the case of a consortium tender, only one submission covering all the partners is required but consortia are advised to make clear the proposed role that each partner will play in performing the contract as per the requirements of the technical specification. We expect the bidder to indicate who in the consortium will be the lead contact for this project, and the organisation and governance associated with the consortia.

Contractors must provide details as to how they will manage any sub-contractors and what percentage of the tendered activity (in terms of monetary value) will be sub-contracted.

If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided in the Annex of the bid. However, please note BEIS reserves the

right to require a successful consortium to form a single legal entity in accordance with Regulation 28 of the Public Contracts Regulations 2006.

BEIS recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to BEIS so that it can make a further assessment by applying the selection criteria to the new information provided.

12. Budget

The budget for this project is £40,000 - £60,000 for Lot 1 and £40,000 - £50,000 for Lot 2 Alternatively, contractors may bid for both Lots and include cost efficiencies, estimated costs £75,000-£110,000.

Contractors should provide a full and detailed breakdown of costs (including options where appropriate). This should include staff (and day rate) allocated to specific tasks.

Cost will be a criterion against which bids which will be assessed.

Payments will be linked to delivery of key milestones. The indicative milestones and phasing of payments will be linked receipt and acceptance of outputs for each respective lot as set out in table 2 and 4. This can be adjusted and agreed with the contractor based on the tender response.

In submitting full tenders, contractors confirm in writing that the price offered will be held for a minimum of 60 calendar days from the date of submission. Any payment conditions applicable to the prime contractor must also be replicated with sub-contractors.

The Authority aims to pay all correctly submitted invoices as soon as possible with a target of 10 days from the date of receipt and within 30 days at the latest in line with standard terms and conditions of contract.

13. Evaluation of Tenders

Bidders may bid for (and be awarded into) one or both lots on this contract.

Contractors are invited to submit full tenders for individual lots, excluding declarations. Tenders will be evaluated by at least three BEIS staff. Requirements for the tender process vary based on whether bidders wish to bid for individual lots or both lots as set out below:

Lot 1	Lot 2	Tender response required	Price Schedule
X		For Lot 1 only	For Lot 1 only
	X	For Lot 2 only	For Lot 2 only
X	X	Two separate responses for 1 and 2	Two price schedules covering Lot 1 and 2 separately

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÷3 = 5.33)

Pass / Fail criteria		
Questionnaire	**Q No.**	**Question subject**
Commercial	SEL1.2	Employment breaches/ Equality
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 Lot 1	Compliance to the Contract Terms
Commercial	AW4.2 Lot 1	Changes to the Contract Terms
Commercial	AW4.1 Lot 2	Compliance to the Contract Terms
Commercial	AW4.2 Lot 2	Changes to the Contract Terms
Commercial	AW5.1 Lot	Firm and fixed price
Commercial	AW5.1 Lot 2	Firm and fixed price
Commercial	AW5.3Lot 1	Maximum budget
Commercial	AW5.3 Lot 2	Maximum budget
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
Quality	AW6.4	Non-Disclosure Agreement
-	-	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.

LOT 1

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20%
Quality	PROJ1.1	Approach /Methodology	40%
Quality	PROJ1.2	Staff to Deliver / Skills & Expertise	20%
Quality	PROJ1.3	Understanding the Project Environment	10%
Quality	PROJ1.4	Project plan & timescales	10%

LOT 2

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20%
Quality	PROJ1.1	Approach /Methodology	40%
Quality	PROJ1.2	Staff to Deliver / Skills & Expertise	20%
Quality	PROJ1.3	Understanding the Project Environment	10%
Quality	PROJ1.4	Project plan & timescales	10%

Evaluation of criteria

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

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20**%**.
Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:
Score = {weighting percentage} x {bidder's score} = 20% x 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. 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) ÷ 4 = 50

Once the above evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, if required by the commercial lead, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.

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 x 50 = 40)

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

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

Evaluation process

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

Stage	Summary of activity
Receipt and Opening	• ITQ logged upon opening in alignment with UK SBS's procurement procedures. • Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to the Contracting Authority or the e-sourcing tool beyond the bidder control are responsible for late submission.
Compliance check	• Check all Mandatory requirements are acceptable to the Contracting Authority. • Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.
Scoring of the Bid	• Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	• The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	• 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.
Moderation meeting (if required to reach an award decision)	• To review the outcomes of the Commercial review • To agree final scoring for each Bid, relative rankings of the Bids •
Due diligence of the Bid	• the Contracting Authority may request the following requirements at any stage of the Procurement. • Submission of insurance documents from the Bidder • Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder • Taking up of Bidder references from the Bidders Customers. • Financial Credit check for the Bidder
Validation of unsuccessful Bidders	• 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.

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

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 90 days 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 2nd 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
- Equalities Act introduction
- Bribery Act introduction
- Freedom of information Act

8.0 Freedom of information

8.4.1   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), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.

8.4.2   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.

8.4.3   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.

8.4.4   Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.

8.4.5   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 UK SBS 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.

8.5.   Response Validity

8.5.1   Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

8.6.   Timescales

8.6.1   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.

8.7.   The Contracting Authority's Contact Details

8.7.1   Unless stated otherwise in these Instructions or in writing from UK SBS 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 e-sourcing tool to the designated UK SBS contact.

8.7.2
All enquiries with respect to access to the e-sourcing tool may be submitted to Delta eSourcing on 0845 270 7050 please not this is a free self-registration website and this

can be done by completing the online questionnaire at https://uksbs.delta-esourcing.com/

8.7.3   Bidders should be mindful that the designated Contact should <u>not under any circumstances</u> be sent a copy of their Response outside of the e-sourcing tool. Failure to follow this requirement will result in disqualification of the Response.

Appendix 'A' Glossary of Terms

TERM	MEANING
"UK SBS"	means UK Shared Business Services Ltd herein after referred to as UK SBS.
"Bid", "Response", "Submitted Bid ", or "ITQ Response"	means the Bidders formal offer in response to this Invitation to Quote
"Bidder(s)"	means the organisations being invited to respond to this Invitation to Quote
"Call Off Contract"	means the document set out in Schedule of the Contract
"Central Purchasing Body"	means a duly constituted public sector organisation which procures supplies/services/works for and on behalf of contracting authorities
"Conditions of Bid"	means the terms and conditions set out in this ITQ relating to the submission of a Bid
"Competed Supplies/Services	means the competed supplies/services which will be Ordered from the Contract following a Mini-Competition and are set out at Schedule of the Contract
"Contract"	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
"Contracting Bodies"	means the Contracting Authority and any other contracting authorities described in the Contracts Finder Contract Notice
"Contracting Authority"	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
"Customer"	means the legal entity (or entities) for which any Contract agreed will be made accessable to.
"Direct Award"	
"Due Diligence Information"	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
"EIR"	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
"FoIA"	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
"Invitation to Quote" or "ITQ"	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. **NOTE:** This document is often referred to as an Invitation to Tender within other organisations
"Lot"	means a discrete sub-division of the requirements
"Mandatory"	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
"Named Procurement person "	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
"Order"	means an order for served by any Contracting Body on the Supplier
"Other Public Bodies"	means all Contracting Bodies except the Contracting Authority
"Supplier(s)"	means the organisation(s) awarded the Contract
"Supplies / Services / Works"	means any supplies/services and supplies or works set out at within Section [4] Specification