



Salisbury Managed  
Procurement Services



Salisbury  
NHS Foundation Trust



the  
energy  
brokers

Outline for prospective suppliers to  
Salisbury NHS Foundation Trust  
Framework for Fixed Term and Flexible  
Energy Contracts

January 2017



# Summary

The purpose of this document is to provide an outline of the requirements and processes for a Gas and Electricity Framework for Salisbury NHS Foundation Trust supported by The Energy Brokers Limited who will administer the process.

This Framework for Fixed Term and Flexible Energy Contracts will be available to NHS Trusts and other public sector bodies.

The contents of this document are to provide such details, as suppliers may need to take part in the process of bidding through the use of a Competitive Procedure with Negotiation.

## Duration

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48 month framework agreement

Start Date:01/10/2018

## Procedure

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The tender is being run using Competitive Procedure with Negotiation

## Value and Volume

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Anticipated Framework Value between £19,000,000 and £91,250,000 per annum

See Lot details for specific volumes and contract value

## Product

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The Energy Broker Limited (TEBL) are seeking to Establish a four year framework agreements with suppliers for the provision of Electricity and Gas with TEBL acting as an intermediary to buy these products on the wholesale market on behalf of NHS Trust and Local Authorities organisations within England, Wales and Scotland. The details of these organisations can be viewed at the following web address <https://secure.tebl.com/tender/healthcarelist>

The framework will consist of three lots which will cover the provision of Flexible Gas Contracts, Flexible Half Hourly Electricity contracts and fixed term Non Half hourly electricity contacts.

The Lots for Flexible Gas and Flexible Half Hourly electricity will result in a single provider for each and the Lot for Non Half hourly electricity will result in a number of providers who will then participate in a mini competition for each specific requirement.

The suppliers will be required to demonstrate that they have UK trading licence and have at least three years trading history in the UK.

Interested parties should note the specific Lot descriptions.

Interested parties may bid for more than one lot, however each Lot will be considered independently and separately.

## Lots

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The framework will consist of three lots

### **Lot No: 1**

#### **Flexible contracts for Mains Gas.**

Form a framework agreement for the supply of flexible contracts for Mains Gas which is capable of Delivering a Flexible Purchasing Consortium Product – (Cashout only Product)

CPV 09121200

Approximate Framework Volume 100 GWh to 500Gfh per annum.

Approximate Value £4M to £20M per annum

This will be awarded to a single supplier for supplying all the framework needs

### **Lot No: 2**

#### **Flexible contracts for Half Hourly Electricity.**

Form a framework agreement for the supply of flexible contracts for electricity which is capable of delivering Flexible Purchasing Consortium product – (Baseload only, Volume Tolerance Product)

CPV 09310000

Approximate Framework Volume 100 GWh to 500 GWh per annum

Approximate Value £12M to £60M per annum

This will be awarded to a single supplier for supplying all the framework needs

### **Lot No: 3**

#### **Fixed Term Contracts for Non Half Hourly Electricity.**

TEBL wishes to establish a framework agreement for the supply of fixed price contract for Non Half Hourly electricity (Fixing both wholesale energy and third party costs: This will include & fix - CfD, FITS, RO, CM, BUSOS, Elexon & EII)

CPV 09310000

Approximate Framework Volume 20 GWh to 75 GWh per annum

Approximate Value £3M to £11.25M per annum

This will be awarded to a number of suppliers who will take part in a mini competition to meet the specific requirements of each customer.

## Timeline

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19/01/2017 - Issue Selection Questionnaire (SQ)  
26/02/2018 - Deadline for Responses to SQ – Responses by 3:00pm GMT  
28/02/2018 - Issue of Invitation for Initial Tender Submissions  
09/03/2018 - Deadline for Responses for Initial Tender Submissions – Responses by 3:00pm  
12/03/2018 - Start of Negotiation Rounds  
20/03/2018 - Invite Final Tender Submission  
23/03/2018 - Deadline for Final Tender Submission  
05/04/2018 - Selection of preferred bidder  
06/04/2018 - 10 day standstill commences  
18/04/2018 - Issue of Award Notice  
01/10/2018 - Framework begins

## Overview and Information about Salisbury NHS Trust and The Energy Brokers Limited

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### Salisbury NHS Trust

Salisbury NHS FT's Commercial Services team are responsible for a number of the Trust's outward facing businesses, and provide procurement and commercial expertise to both the Trust and a number of collaborative organisations across the NHS. One of the original Carter Programme trusts, SFT are also national demonstrator site for Scan4Safety / GS1 implementation, and have experience in commercialising areas of the Trust's services to a wider market, as well as bringing innovations to market for the benefit of the NHS.

Salisbury NHS Foundation Trust are therefore a Contracting Authority within the meaning of the Public Contract Regulations 2015, and are able to make this DPS available to other public organisations listed in the relevant section of this document. Salisbury Managed Procurement Services is a trading name of Salisbury NHS Foundation Trust for the delivery of this Framework and associated services.

### The Energy Brokers Limited (TEBL)

We are specialists in procuring and managing energy and other utilities, in understanding and reducing risk, in taking a genuinely commercial view of clients' business and its requirements and then matching that with the most appropriate and cost-effective energy strategy.

Supporting Salisbury NHS Foundation Trust we are developing a Consortium Energy Framework product - unique fully managed approach to flexible energy procurement that enables smaller mid-market companies to benefit from economies of scale, more agile purchasing and lower costs – with

no cross-subsidy meaning you only pay for what you use while gaining all the benefits of your own optimised energy procurement by an industry leader.

Overview of a similar product for UK Universities- which we are planning to emulate

- Designed for mid-market energy users who want to save money and minimise market risk: gain price benefits through a portfolio approach to energy buying
- We manage the complexity on your behalf, planning and handling smarter energy procurement throughout the agreed life of the portfolio
- Consortium membership also includes our industry-leading Bill Validation service to ensure you're being charged the correct amount

## Instructions for Completion of the SQ

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1. Bidders are invited to complete the attached SQ and to submit it, together with any requested supporting information, via the Delta E-procurement portal by the due date for return, in accordance with the procedures set out in the paragraph 11 below entitled "Submission of Completed Selection Questionnaires".
2. Bidders should follow the instructions outlined below when completing this SQ.
3. Bidders should answer all questions as accurately and concisely as possible in the same order as the questions are presented. Where a question is not relevant to the Bidder's organisation, this should be indicated, with an explanation.
4. The information supplied will be checked for completeness and compliance with the instructions before responses are evaluated.
5. Failure to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that a Bidder will not receive the full scores available. In the event that none of the responses are deemed satisfactory, The Authority and the Tender Manager reserve the right to terminate the procurement and where appropriate re-advertise the procurement.
6. Bidders should try to be explicit and comprehensive in their responses to this SQ as this is designed to be the single source of information on which responses will be scored and ranked. Bidders are advised neither to make any assumptions about their past or current supplier relationships with The Authority and the Tender Managers nor to assume that such prior business relationships will be taken into account in the evaluation procedure.
7. Any questions about the procurement should be submitted via the message centre on the Bravo eSourcing portal. Any question or request for clarification and the response will be communicated via the Bravo eSourcing portal to all Bidders who have expressed an interest in the opportunity unless commercially sensitive.
8. All responses received and any communication from Bidders will be treated in confidence but will be subject to the above paragraph.

9. No approach of any kind in connection with this SQ should be made to any person within, or associated with The Authority and the Tender Managers other than as described in Point 7 above.

#### Queries About the Procurement

10. This SQ is being provided on the same basis to all Bidders.
11. The Authority and the Tender Managers will not enter into detailed discussion of the requirements at this stage.
12. If any Bidder requires any further information or wishes to raise any query, such requests or queries should be sent via the Bravo eSourcing portal.
13. Bidders should note that any queries should be raised and submitted to The Authority and the Tender Managers by the deadline.
14. All queries raised by Bidders during the procurement will be fully documented and, where such queries are not of a commercially confidential nature, both the query and The Authority and the Tender Managers's response to the query will be circulated to all Bidders via the Bravo eSourcing portal.
15. The Authority and the Tender Managers will endeavour to answer all such requests and/or queries at least three (3) working days before the Closing Date referred to.
16. All responses received and any communication from Bidders will be treated in confidence but will be subject to this paragraph.

#### Additional Information

- 17 The Authority and the Tender Managers expressly reserves the right to request that a Bidder provide additional information supplementing or clarifying any of the information provided in response to the requests set out in this SQ. The Authority and the Tender Managers may seek independent financial and market advice to validate information declared, or to assist in the evaluation.

#### Bidder Contact Point

- 18 Bidders are asked to include a single point of contact in their organisation for their response to the SQ. The Authority and the Tender Managers will not be responsible for contacting the Bidder through any route other than the nominated contact. The Bidder must therefore undertake to notify any changes relating to the contact promptly.

#### Submission of Completed SQs

- 19 Bidders are requested to complete all parts of the SQ.
- 20 Copies of Insurance Policies and supporting information should not be included with a submission. Any such Policies will not be evaluated nor considered in any short-listing exercise at SQ stage. Similarly, advertising material and promotional literature will not be evaluated nor considered.
- 21 Bidders should answer all questions as accurately and concisely as possible. Where a question is not relevant to your organisation, this should be indicated, with an explanation.

- 22 Supporting information should be presented in the same order as, and should be referenced to, the relevant question.
- 23 Bidders shall complete and submit their SQs electronically via the Bravo eSourcing portal at [https://nhs.bravosolution.co.uk/nhs\\_collaborative/web/login.html](https://nhs.bravosolution.co.uk/nhs_collaborative/web/login.html). You are invited to submit your proposals on the understanding that there will be no cost chargeable to The Authority and the Tender Managers in relation to your participation in the review process. It is your responsibility to ensure that your submission is designed and packaged in such a way as to be successfully uploaded.
- 24 To be considered, SQs must be received by The Authority and the Tender Managers no later than the date listed in the timetable above. (the Closing Date) or such later date as The Authority and the Tender Managers notifies Bidders.
- 25 Any SQs, proposals or other supporting documents received after such time and date will not be considered for acceptance by The Authority and the Tender Managers.
- 26 Responses will be evaluated in accordance with the procedures set out in Paragraph 12 of this SQ. In the event that none of the responses are deemed satisfactory, the Contracting Authority reserves the right to consider alternative procurement options.

#### Acceptance of SQs

- 27 The Authority and the Tender Managers reserves the right to accept any SQ submitted.
- 28 The Authority and the Tender Managers shall not be bound to accept any SQ and reserves to itself the right at its absolute discretion to accept or not accept any SQ submitted.
- 29 The Authority and the Tender Managers may in its absolute discretion refrain from considering a SQ if either:
  - 30 it does not comply in any respect with the requirements of the tender; or
  - 31 it contains any significant omissions.

#### Bidder Selection

- 32 The objective of the SQ process is firstly to assess the responses to the SQ to confirm which Bidders meet The Authority and the Tender Managers' minimum standards and secondly to select Bidders to be invited to tender, each by reference to the mandatory and non-mandatory ineligibility criteria and the Bidder's economic and financial standing and technical and professional ability. The Authority and the Tender Managers will evaluate responses to this SQ based on your stated ability to provide the range of services that we consider suitable and relevant for the organisations.
- 33 Reference site visits or demonstrations and / or presentations are unlikely to be requested during the SQ stage, but The Authority and the Tender Managers reserves the right to request the same as a part of the SQ process.
- 34 Selection and selection criteria will be a combination of both financial and non-financial factors in line with Regulation 58(19) of the Public Contracts Regulations 2015, and The Authority and the Tender Managers will consider:
  - 35 **Mandatory and non-mandatory ineligibility criteria** – status of the Bidder in relation to Regulation 57 of the Public Contracts Regulations 2015.

36 **Economic and financial standing** – the Bidder must be of a sound financial position to participate in a procurement of this size as set out in Regulation 58(7-10) of the Public Contracts Regulations 2015. This may entail independent financial checks in accordance with Regulation 60(6-8) of the Public Contracts Regulations 2015.

37 **Bidder’s technical and professional ability** – assessment of the totality of resources and core competencies available to the Bidder as set out in Regulation 58 of the Public Contracts Regulations 2015(15-18). This may entail independent financial checks in accordance with Regulation 60(9) of the Public Contracts Regulations 2015.

38 SQs will be assessed to ascertain whether they pass the relevant thresholds as set out below. The weightings and thresholds described below will be applied to the evaluation criteria. In the event that a “fail” mark is awarded to a Bidder for any of these questions, the The Authority and the Tender Managers reserves the right to disqualify that Bidder from the process.

	<b>Question Reference</b>	<b>Topic</b>	<b>Pass / Fail / Weighting</b>
Part 1	Section 1	Potential Supplier Information	Information
Part 2	Section 2	Grounds for Mandatory Exclusion	Pass/Fail
Part 2	Section 3	Grounds for Discretionary Exclusion	Pass/Fail

39 Bids will then be scored in accordance with the following weightings:

	<b>Question Reference:</b>	<b>Topic</b>	<b>Pass / Fail / Weighting</b>
Part 3	Section 4	Economic & Financial standing	Pass/Fail
Part 3	Section 5	Wider Group	Information
Part 3	Section 6	Technical & Professional Ability	100%
Part 3	Section 7	Modern Slavery Act 2015	Pass/Fail
Part 3	Section 8	Additional Questions	
	8.1	Insurances	Pass/Fail
	8.2	Skills and Apprenticeships	Information
	8.3	Trading Capabilities	Pass/Fail
	8.4 a, c, e	Specific Product Capabilities	Pass – answer ‘Yes’ to both questions Fail – answer ‘No’ to either question
	8.4 b, d, f	Specific Product Capabilities	Pass – answer

			'Yes' to both questions Fail – answer 'No' to either question
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- 40 Failure to provide a satisfactory response to any of the questions may result in the Bidder not being awarded full scores and The Authority and the Tender Managers therefore not proceeding further with the Bidder. Where a Bidder has a valid reason for being unable to provide the information requested in relation to economic, financial and insurance matters, the other information considered appropriate by The Authority and the Tender Managers will be accepted.
- 41 The information supplied will be checked for completeness and compliance before responses are evaluated. Responses will be reviewed by a team of officers of the Contracting Authority and Tender Managers. Each **scored** question will be marked out of 100 on the basis of the table set out below.

Comment	Judgement	Marks available
The response / evidence exceeds expectations and demonstrates clear and strong evidence of delivery as part of an integrated team and how this has become part of a continuous improvement process	Excellent	100
The response / evidence provided fully meets the required standard	Good	80
Meets the majority of the requirements but not all – for instance, where a response deals only with processes and little output evidence is provided – or where evidence provided is acceptable but with some minor reservations.	Satisfactory	60
Meets some of the requirements but not others	Unsatisfactory	40
Fails to meet the majority of the requirements but meets some or where the evidence provided is deficient in certain areas where the details of relevant evidence require the assessor to make assumptions.	Poor	20
Does not meet the requirements at all / evidence is unacceptable or non-existent.	Failed	0

- 42 Each submitted SQ will be evaluated consistently and objectively according to the selection criteria and weightings defined in the model above.
- 43 Responses to questions, which are for information only, will not be scored. Bidders should note, however, that any SQ response, which fails to provide the requested information in response to any question, will not receive full scores and may be excluded from selection by The Authority and the Tender Managers.

- 44 The information supplied will be checked for completeness and compliance before responses are evaluated.
- 45 The answers to each question should be succinct and in line with any word counts indicated within or under each section heading. Any part of an answer which exceeds any predetermined word count will be ignored.
- 46 If any Bidder makes a false or misleading statement or fails to provide full information in response to this SQ their application may at the discretion of the Contracting Authority not receive full scores, or in the case of misleading statements may also be disregarded.
- 47 A shortlist of Bidders will be drawn up according to the Rank and Scores achieved against our criteria and those shortlisted will be eligible to participate further in the procurement process.
- 48 As noted in 1.2 above, a Short List of a minimum of three (where there are three suitably qualified bidders) qualified Bidders will be invited to proceed to the next stage of the procurement.
- 49 We will inform all Bidders of the result, in accordance with the draft timetable outlined in paragraph 3 of this SQ.
- 50 Evaluation of subsequent stages will be undertaken in accordance with the overall evaluation strategy for the contracts. The high-level evaluation criteria will be set out in the Invitation to Tender.
- 51 The Contract will not necessarily be awarded to the Bidder submitting the lowest total quotation (i.e. Premium and if applicable, Broker Fee or commissions). Steps will be in place in stage 2 of this process to ensure The Authority and the Tender Managers does not have to automatically accept any abnormally low Tender bids in accordance with Regulation 69 of the Public Contracts Regulations 2015.

## Guidance to Potential Suppliers

- 51.1 This Selection Questionnaire asks potential suppliers to initially just self-declare their status against the exclusion grounds and selection questions.
- 51.2 This Selection Questionnaire is structured in 3 separate parts:
  - 51.2.1.1 Part 1 of the standard Selection Questionnaire covers the basic information about the supplier, such as the contact details, trade memberships, details of parent companies, group bidding and so on.
  - 51.2.1.2 Part 2 covers a self-declaration regarding whether or not any of the exclusion grounds apply.
  - 51.2.1.3 Part 3 covers a self-declaration regarding whether or not the company meets the selection criteria in respect of their financial standing and technical capacity
- 51.3 An EU ESPD template and response to selection questions submitted by a potential supplier from another Member State, will be evaluated alongside this Selection Questionnaire submissions from potential UK suppliers. The exclusion criteria are common to all Member States, and will, therefore, be the same for all potential suppliers.

## General rules for this Selection Questionnaire

- 51.4 Potential suppliers are asked to complete this Selection Questionnaire and submit a copy alongside the selection evidence. The Selection Questionnaire can be found at Part B. The exclusion questions provided in Part 2 of the template should be supplemented with the relevant supplier selection questions listed in Part 3.
- 51.5 Documentary evidence is not required when the standard Selection Questionnaire is submitted. Where the evidence is available in a relevant national database, free of charge, the potential supplier can state where the requested evidence can be found (i.e. the name of the repository, website, identification of the file etc.).
- 51.6 However, we may ask any potential supplier at any time during the procurement to submit all or part of the evidence if it is necessary to ensure the proper conduct of the procedure. We will check the evidence of the winning bidder before award of the contract.

## Guidance on Part 1 and Part 2 (exclusion grounds<sup>1</sup>) - key principles

- 51.7 It is mandatory for a potential supplier to complete Part 1 and Part 2 of the standard Selection Questionnaire, or the ESPD template, for this procurement.
- 51.8 Part 1 and Part 2 of this Selection Questionnaire will provide us with a formal statement that the relevant grounds for exclusion do not apply to the potential supplier completing it. A completed form is required for each organisation the potential supplier will rely on to meet the selection criteria. This means that where the potential supplier is a group of suppliers, including joint ventures and partnerships, each potential supplier in that group must complete Part 1 and Part 2 of the Selection Questionnaire self-declaration.

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<sup>1</sup> List of exclusion grounds can be found at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/551130/List\\_of\\_Mandatory\\_and\\_Discretionary\\_Exclusions.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf)

## Guidance on Part 3 of Selection Questionnaire and qualitative selection – key principles

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### Self-declarations

- 51.9 We will allow potential suppliers to self-declare that they meet the relevant criteria in the supplier selection stage. Only the winning supplier (and any organisations relied upon to meet the winning supplier's selection criteria) will be required to submit evidence, this being required before the Contract Award.
- 51.10 If the winning supplier fails to provide the required evidence within set timeframes, or the evidence proves unsatisfactory, the award of the contract will not proceed.
- 51.11 We can require information from any supplier at any stage if it is necessary to ensure proper conduct of this procurement procedure.

### Group of potential suppliers

- 51.12 If the potential supplier is bidding on behalf of a group, for example, a consortium, or intends to use sub-contractors, there are different actions required for completion of Part 3 of the standard Selection Questionnaire compared to Part 1 and Part 2.
- 51.13 The consortium lead should complete all of the questions on behalf of the consortium and/or any sub-contractors. The consortium lead should make it clear who the lead member of the group is, and who will be contractually responsible for delivery of the contract.
- 51.14 All members of the group are required to provide the information required in Part 3 of the standard Selection Questionnaire or procurement documents, as part of a single composite response (unless the question specifically directs otherwise). We may require members of the group to assume a specific legal form if awarded the contract, if considered necessary for the satisfactory performance of the contract. Where the group is proposing to create a separate legal entity, such as a Special Purpose Vehicle (SPV) or consortium, they should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity. They should also provide the name for the new entity and details of its legal and operational structure.
- 51.15 If Bidder arrangements change in any way, any updates should be provided to us before the Contract Award stage. This will allow us to request a self-declaration of the exclusion grounds (Part 1 and Part 2 of the standard Selection Questionnaire) for any new organisation, and carry out a further assessment using the standard selection questions and any specific selection criteria. We reserve the right to deselect a potential supplier or a group prior to any award of contract, based on an assessment of the updated information.

## Guidance on supplier selection questions Economic and financial standing

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51.16 We will allow potential suppliers to self-certify that they meet minimum financial requirements when assessing economic and financial standing. Checks against self-certification will only be carried out on the winning supplier.

### Technical and professional ability Past Performance

51.17 We will evaluate the past performance of a potential supplier. Suppliers are required to have sufficient level of experience demonstrated by suitable references.

51.18 We require details of contract examples or references from either the public or private sector that are relevant to the requirement. Contracts should have been performed during the past three years.

51.19 Potential suppliers are requested to submit details of contracts where the named customer contact is prepared to provide written evidence to confirm the accuracy of the information provided. Customer references should be factual.

51.20 If this is not possible (for example a potential supplier is newly formed or an SPV will be created for the contract) up to three separate examples should be provided from the principal officers or members of the group.

### Sub-contractors and supply chains

51.21 Bids submitted by a potential supplier proposing to use sub-contractors should provide a relevant example where one or more of the essential sub-contractors have delivered similar requirements (separate examples are not required from each sub-contractor).

### Modern Slavery Act 2015 2

51.22 Since 1 October 2015, commercial organisations that carry on a business or part of business in the UK, supply goods or services and have an annual turnover of £36 million or more ("relevant commercial organisations") have been required under Section 54 of the Act to prepare a slavery and human trafficking statement as defined by section 54 of the Act.

## Part B - Selection Questionnaire

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Potential Supplier Information and Exclusion Grounds: Part 1 and Part 2.

The Selection Questionnaire is a self-declaration, made by the potential supplier, that you do not meet any of the grounds for exclusion<sup>3</sup>. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (self-cleaning).

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<sup>2</sup> For background see Home Office publication

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/471996/Transparency\\_in\\_Supply\\_Chains\\_etc\\_A\\_practical\\_guide\\_final\\_.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/471996/Transparency_in_Supply_Chains_etc_A_practical_guide_final_.pdf)

A completed declaration of Part 1 and Part 2 provides a formal statement that the organisation making the declaration has not breached any of the exclusions grounds. Consequently, we require all the organisations that you will rely on to meet the selection criteria to provide a completed Part 1 and Part 2. For example, these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria. This means that where you are joining in a group of organisations, including joint ventures and partnerships, each organisation in that group must complete one of these self-declarations. Sub-contractors that you rely on to meet the selection criteria must also complete a self-declaration (although sub-contractors that are not relied upon do not need to complete the self-declaration).

When completed, this form is to be sent back to the contact point given in the procurement documents along with the selection information requested in the procurement documentation.

### **Supplier Selection Questions: Part 3**

The procurement document will provide instructions on the selection questions you need to respond to and how to submit those responses. If you are bidding on behalf of a group (consortium) or you intend to use sub-contractors, you should complete all of the selection questions on behalf of the consortium and/or any sub-contractors.

If the relevant documentary evidence referred to in the Selection Questionnaire is not provided upon request and without delay we reserve the right to amend the contract award decision and award to the next compliant bidder.

### **Consequences of misrepresentation**

If you seriously misrepresent any factual information in filling in the Selection Questionnaire, and so induce an authority to enter into a contract, there may be significant consequences. You may be excluded from the procurement procedure. If a contract has been entered into you may be sued for damages and the contract may be rescinded. If fraud, or fraudulent intent, can be proved, you or your responsible officers may be prosecuted and convicted of the offence of fraud by false representation.

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<sup>3</sup> For the list of exclusion please see [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/551130/List\\_of\\_Mandatory\\_and\\_Discretionary\\_Exclusions.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf)

## The Authority and the Tender Managers

### PROCUREMENT PROCEDURE

#### Notes for completion

1. The “authority” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to invite suitable candidates to participate in this procurement process.
2. “You” / “Your” refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the “regulations”) and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions, please submit a clearly identified Part.
4. The authority recognises that arrangements set out in section 1.2 of the standard Selection Questionnaire, in relation to a group of economic operators (for example, a consortium) and/or use of sub-contractors, may be subject to change and will, therefore, not be finalised until a later date. The lead contact should notify the authority immediately of any change in the proposed arrangements and ensure a completed Part 1 and Part 2 is submitted for any new organisation relied on to meet the selection criteria. The authority will make a revised assessment of the submission based on the updated information.
5. For Part 1 and Part 2 every organisation that is being relied on to meet the selection must complete and submit the self-declaration. For Insurance Brokers, in 1.2(b)-ii, you should provide details of the Property and Casualty Insurers that you expect to participate in the proposed programme of Insurance.
6. For answers to Part 3 - If you are bidding on behalf of a group, for example, a consortium, or you intend to use sub-contractors, you should complete all of the questions on behalf of the consortium and/ or any sub-contractors, providing one composite response and declaration.

The authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure.