

# Invitation to Quote



Department for  
Business, Energy  
& Industrial Strategy

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

**Subject: Community Benefits for Electricity Transmission Network Infrastructure**

**Sourcing Reference Number: PS23016**

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

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

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

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

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

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

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

### Our Customers

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

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

### **Privacy Statement**

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

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

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

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

## **Privacy Notice**

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the 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](mailto:dataprotection@beis.gov.uk)

## Section 2 – About the Contracting Authority

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

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

The Department is responsible for:

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

BEIS is a ministerial department, supported by 46 agencies and public bodies. We have around 2,500 staff working for BEIS. Our partner organisations include 9 executive agencies employing around 14,500 staff.

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

## Section 3 – Working with the Contracting Authority

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

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	<b>Department for Business, Energy and Industrial Strategy (BEIS)</b> 1 Victoria Street London SW1H 0ET
3.2.	Buyer name	Alex Marks
3.3.	Buyer contact details	<a href="mailto:professionalservices@uksbs.co.uk">professionalservices@uksbs.co.uk</a>
3.4.	Maximum value of the Opportunity	£115,000.00 excluding VAT (maximum)
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered, unless formally advised to do so by UKSBS.</b>

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Friday, 20 January 2023
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Wednesday, 01 February 2023 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Friday, 03 February 2023
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal ( <b>the Deadline</b> )	Friday, 10 February 2023 14:00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday, 15 February 2023
3.11.	Anticipated Contract Award date	Friday, 17 February 2023
3.12.	Anticipated Contract Start date	Wednesday, 22 February 2023
3.13.	Anticipated Contract End date	Monday, 31 July 2023
3.14.	Bid Validity Period	90 Days



## Section 4 – Specification

### 1. Background

#### **Project Background/ Context**

The energy system is undergoing profound and fundamental changes. As recent events have demonstrated, now more than ever, we must focus on securing home-grown energy supplies. In 2019, the UK was the first major economy in the world to set a binding target to reach net zero emissions by 2050. In June 2021, the government passed the Sixth Carbon Budget into law, with the aim to reduce emissions by 78% by 2035 compared to 1990 levels. The British Energy Security Strategy sets out a package of measures to speed up our deployment of all clean and renewable technologies.<sup>1</sup> Moving away from dependency on the global energy market, we have committed to fully decarbonising the electricity supply by 2035, including an ambition for up to 50GW of offshore wind by 2030.

As we increase the development of clean and renewable energy generation within the UK, we will also need to increase the scale of the electricity transmission network and its rate of deployment across the country. It will not be possible to deliver a secure energy supply that is vital to growth and prosperity without developing the electricity transmission network, both on and offshore, to support it. The British Energy Security Strategy recognises this and includes actions to accelerate electricity network build, dramatically reducing timelines for strategic onshore transmission network infrastructure by around three years and aspiring to halve the end-to-end process by the mid-2020s.

The government and Ofgem published in August 2022 the Electricity Networks Strategic Framework<sup>2</sup>, which outlines actions the government and Ofgem are taking to ensure the electricity network can act as an enabler to meet our net zero target and support domestic energy security. This publication sets out a shared vision for the transformation of the electricity network, which will ensure it can act as an enabler for a clean, secure and low-cost energy system, including measures to keep future network requirements to a minimum. For example, BEIS and Ofgem are committed to delivering a smart and flexible energy system that is essential for helping manage network capacity as an alternative to building more physical infrastructure.

Where infrastructure cannot be avoided, impacts will be reduced and mitigated through strategic network planning and the planning system. Strategic network planning at pre-planning stage, undertaken through the Offshore Transmission Network Review<sup>3</sup> and Holistic Network Design<sup>4</sup> (HND), which will be taken forward through Centralised Strategic Network Planning, includes early consideration of environmental and community impacts. By considering these impacts up front and at a strategic level, the network blueprints can also reduce the overall need for transmission network infrastructure via coordination and identify locations for infrastructure with lower overall impact than would be the case with a piecemeal project-by-project approach. Communities are then empowered within the planning system to have a say in the design and development of a project, and to give their views on whether a project should proceed. Community benefits are a part of this wider package to bring communities with us when developing network infrastructure and will

<sup>1</sup> <https://www.gov.uk/government/publications/british-energy-security-strategy/british-energy-security-strategy>

<sup>2</sup> <https://www.gov.uk/government/publications/electricity-networks-strategic-framework>

<sup>3</sup> <https://www.gov.uk/government/groups/offshore-transmission-network-review>

<sup>4</sup> <https://www.nationalgrideso.com/future-energy/the-pathway-2030-holistic-network-design>

ensure that where infrastructure is necessary communities can directly recognise the benefit of hosting this infrastructure.

Despite these measures to keep future network requirements to a minimum, due to the shift away from fossil fuels, we will still require an increase in electricity transmission network across Great Britain, both onshore and offshore. This is due to the changing nature of demand and generation, which will place new pressures on the electricity network. Given the move to significantly more offshore wind – and onshore wind, solar and nuclear in rural areas – larger shares of generation will be situated further away from centres of demand (i.e. large cities). The Electricity System Operator has acknowledged that whilst adopting an integrated approach across onshore and offshore networks can minimise the overall increase, the increased levels of offshore wind mean that there will be an increase of onshore infrastructure in all options.

Communities that host electricity network infrastructure – along with other energy infrastructure – are supporting households and businesses across the country in achieving cheaper, more secure and low carbon energy generation. Whilst BEIS surveys indicate that the majority of people support the transition to net zero,<sup>5</sup> government recognises that there are also concerns about the impact of development in local communities. Within England, Wales and Scotland, there are planning systems that set a legal and robust process for identifying, avoiding and mitigating impacts from transmission network infrastructure build. However, we recognise that it is not possible to address all impacts in their entirety, and that impacts will be felt differently by different communities. The government therefore believes that it is only right that communities should benefit from hosting network infrastructure that delivers a national need, and has committed to consult on options for community benefit schemes for network infrastructure.

Currently, industry voluntarily provides benefits to communities close to electricity transmission network infrastructure. However, initial feedback shows that different approaches are taken by different industry stakeholders, which creates some inconsistency in delivery. Given the scale and rate of deployment necessary to deliver a fully decarbonised electricity sector by 2035, including an ambition for 50GW of offshore wind by 2030, now is the right time to review how community benefits are delivered. This will ensure communities benefit from hosting network infrastructure developments, maximising the investment opportunity for local communities in the transition to net zero.

This research will play a role in ensuring that the views and preferences of communities who host electricity transmission network infrastructure are considered in the development of community benefits policy.

### **What are community benefits schemes?**

Community benefits schemes are agreements to provide financial and/or non-financial benefits to communities as part of an infrastructure project.<sup>6</sup> Any measures introduced as a result of the upcoming consultation will be separate to the planning process and will not be a material consideration in consenting decisions. Communities may oppose planning applications but still benefit from community benefit packages offered by developers if the project goes ahead.

<sup>5</sup> <https://www.gov.uk/government/publications/climate-change-and-net-zero-public-awareness-and-perceptions>

<sup>6</sup> Wijk et al., 2021, ‘Penny wise or pound foolish? Compensation schemes and the attainment of community acceptance in renewable energy’, <https://doi.org/10.1016/j.erss.2021.102260>

There is a diversity of benefits which schemes may offer. These can be categorised by the method of benefit – monetary or non-monetary, and their method of delivery – direct or indirect:

- Monetary benefits involve the transfer of funds between parties and can be delivered directly or indirectly.
  - Examples of direct delivery of monetary benefits include compensation payments and payments to shareholders (e.g. in shared ownership schemes).
  - Examples of indirect delivery include payments to community funds and investments in local projects and resources.
- Non-monetary benefits refer to in-kind benefits which also can be delivered directly or indirectly.
  - Examples of direct delivery of non-monetary benefits includes developers building new infrastructure for communities (such as roads), or affordable housing (e.g. mass housing developments).
  - Examples of indirect delivery includes increasing tourism, employment opportunities and local supply chains.

Community benefits schemes have been established in a range of settings for both energy and non-energy infrastructure projects (e.g. rail and road). Community benefits schemes vary widely with different governance mechanisms, eligibility criteria, levels of funding, funding mechanisms and types of benefit delivered. Schemes may be legally mandated or voluntary. The diversity of schemes has been widely documented and discussed by researchers.<sup>7 8 9</sup>

For electricity transmission network infrastructure projects in England and Wales, National Grid has provided community benefits to community organisations in areas affected by their projects, via their Community Grant Programme.<sup>10</sup> The fund supports projects which aim to achieve social, economic and environmental benefits in affected areas. Scotland's Transmission System Operators (Scottish Power Energy Networks and Scottish and Southern Energy Networks) have also provided community benefits.<sup>11 12</sup> Approaches taken by comparable Transmission Operators in Europe also include community fund approaches, however these vary in key features such as their governance, scheme eligibility criteria and the value of benefits offered.<sup>13</sup> In Ireland, direct household payments have also been used to provide benefits to those affected by electricity transmission network infrastructure projects.<sup>14</sup>

There has been limited research into communities' perceptions and preferences for community benefits schemes for electricity transmission network infrastructure projects.

<sup>7</sup> Glasson, 2017, 'Large Energy Projects and Community Benefits Agreements – Some experience from the UK', <https://doi.org/10.1016/j.eiar.2017.03.009>

<sup>8</sup> Rudolph, Haggett and Aitken, 2015, Community Benefits from Offshore Renewables - Good Practice Review, <https://www.climatechange.org.uk/research/projects/community-benefits-from-offshore-renewables-good-practice-review/>

<sup>9</sup> Kerr, Johnson and Weir, 2017, 'Understanding community benefit payments from renewable energy development', <https://www.sciencedirect.com/science/article/pii/S030142151730109X>

<sup>10</sup> <https://www.nationalgrid.com/responsibility/community/community-grant-programme>

<sup>11</sup> <https://www.ssen.co.uk/about-ssen/our-communities/resilient-communities-fund/>

<sup>12</sup> [https://www.spenerynetworks.co.uk/pages/green\\_economy\\_fund.aspx](https://www.spenerynetworks.co.uk/pages/green_economy_fund.aspx)

<sup>13</sup> RGI, 2018, [https://renewables-grid.eu/fileadmin/user\\_upload/Files\\_RGI/RGI\\_Publications/CommunityPayments\\_2nd\\_edition\\_2018\\_final.pdf](https://renewables-grid.eu/fileadmin/user_upload/Files_RGI/RGI_Publications/CommunityPayments_2nd_edition_2018_final.pdf)

<sup>14</sup> EirGrid, 2016b, <http://www.eirgridgroup.com/site-files/library/EirGrid/EirGrid-Community-Fund-Proximity-Payments.pdf>

The evidence from community benefits schemes in different contexts such as renewable energy projects suggests that schemes are more likely to be effective when they can be flexible to local needs and where perceptions of fairness are boosted, for example through communities being meaningfully engaged from an early stage. Therefore, research and engagement with communities affected by proposed electricity transmission network infrastructure projects, which develops understanding of their needs and preferences, will play an important role in ensuring the effectiveness of community benefits schemes.

### **What will this project do?**

This contract is for the delivery of mixed methods research with host communities for proposed electricity transmission network infrastructure projects, to support the development of community benefits policy. The research is required to develop understanding of the views and preferences of communities affected by proposed electricity transmission network infrastructure projects and how acceptability of projects could be increased through benefits schemes. The research will develop practical insights and recommendations through engagement and collaboration with communities.

### **Which proposed electricity transmission network infrastructure projects are within scope?**

Proposed electricity transmission network infrastructure projects within the scope of this research are all projects classified as an “HND essential option” in the “Network Options Assessment (NOA) 2021/22 Refresh”<sup>15</sup>, which meet the following criteria:

- The proposed project is in England only.
- The proposed project is for new infrastructure. Projects which only involve changes to existing infrastructure, such as line reinforcements or developing existing substations, are not within scope.

Projects within scope are listed in Table 1 below. Further information on sampling requirements for the project are discussed in the “Suggested Methodology” section of this document.

*Table 1: Proposed Electricity Transmission Network Infrastructure Projects within scope*

<b>NOA ref</b>	<b>Short Description of Works</b>
AENC	A new 400 kV double circuit in north East Anglia
ATNC	A new 400 kV double circuit in south East Anglia
BTNO	A new 400 kV double circuit between Bramford and Twinstead
CGNC	A new 400 kV double circuit between Creyke Beck and the south Humber area
EDEU	400 kV upgrade of Brinsworth to Chesterfield double circuit and Chesterfield to High Marnham double circuit. New High Marnham and Chesterfield 400 kV substations
EDN2	New Chesterfield to Ratcliffe-on-Soar 400 kV double circuit

<sup>15</sup> <https://www.nationalgrideso.com/document/232461/download>

GWNC	A new 400 kV double circuit between the south Humber and south Lincolnshire
LRN4	New network need between North Lincolnshire to Hertfordshire
OPN2	A new 400 kV double circuit between the existing Norton to Osbaldwick circuit and Poppleton and relevant 275 kV upgrades
SCD1	New Offshore HVDC link between Suffolk and Kent

## 2. Aims and Objectives of the Project

Focusing on areas near proposed electricity transmission network infrastructure projects, this project aims to engage with communities to support the design and implementation of potential community benefits schemes, which are informed by an understanding of their views and preferences.

### The project has the following objectives:

- To understand communities' views and preferences towards proposed electricity transmission network infrastructure projects in their local areas.
- To understand communities' views, experiences, and preferences towards different types of community benefits approaches, exploring design and implementation features in detail.
- To explore how different approaches to community benefits schemes could affect community acceptability of electricity transmission network infrastructure projects across different groups.
- To develop and assess options for community benefits approaches through engagement and collaboration with communities

### Research Questions

#### 1) What are communities' views towards electricity transmission network infrastructure projects in areas affected by proposed developments?

- a. What are the levels of awareness and understanding about network infrastructure projects and how they are planned and developed?
- b. What are communities' concerns about networks infrastructure projects? (e.g. visual, environmental, health etc)
- c. What changes to projects or information could increase understanding and acceptability?
- d. What are the main drivers of opposition and acceptability?
- e. How is opposition and acceptability distributed across communities? (e.g. is current opposition confined to a small, vocal group?)
- f. What are views towards different types of network infrastructure and how they look? (e.g. preferences for pylons vs. monopoles, views on substations and undergrounding)
- g. How do views and perceptions of electricity transmission network infrastructure differ to other types of infrastructure (e.g. wind turbines versus pylons etc)?

- h. How do views vary across groups and host communities? (Including in relation to variables which might be important such as income, rurality, distance from line, housing tenure, demographics, employment, climate attitudes)

**2) What are communities' views, experiences, and preferences towards different approaches to community benefits, including different options for scheme design, level of benefits and implementation?**

- a. What constitutes an effective community benefits scheme from communities' perspectives?
- b. What are views towards different types of schemes? (e.g. direct benefits, community funds)
- c. What level of benefits/ payments are preferred to improve community acceptability under each option (e.g. direct benefits and community fund)?
- d. What are views on key features of scheme design for each option? (e.g. eligibility, type of benefits, flexibility vs. standardisation across communities, mandated or voluntary, timelines of benefits, fairness/equitability, governance models, and implementation)
- e. How do expectations of what should be included under voluntary and mandatory approaches differ?
- f. What are communities' views on theirs and other stakeholders' roles in designing, negotiating, implementing and managing community benefits schemes?
- g. What, if any, support may be required to build communities' capacity to engage with community benefits schemes and to ensure benefits are tailored to their needs and preferences?
- h. What are communities' expectations of developers and/or fund administrators?
- i. How do views vary across groups and host communities?

**3) How could different approaches to community benefits affect community acceptability of network infrastructure projects? How does this vary across groups and those with different viewpoints? (e.g. demographic and level of opposition to projects)**

- a. What benefits approaches may be more effective at increasing acceptability for groups opposed to projects? (e.g. direct benefits, community funds)
- b. How can the efficacy of schemes be enhanced through engaging communities in design and decision-making processes?
- c. How can benefits schemes be most effectively communicated to communities and stakeholders?
- d. How does the level of flexibility to tailor schemes to different contexts affect acceptability?

**4) What overarching principles or recommendations for community benefits schemes for electricity transmission network infrastructure projects can be developed collaboratively with communities? What options are recommended following a systematic assessment of them?**

- a. To what extent can options/ principles be agreed across communities?
- b. What aspects is there agreement and disagreement on?
- c. What are communities' views on their role and other stakeholders' roles in further developing and implementing potential community benefits policy options?



### 3. Suggested Methodology

Bidders should set out in detail their proposals for developing and delivering this research project alongside discussion of how their research design will answer the research questions. This section outlines BEIS's suggested approach to the research and highlights the areas of the approach which are fixed requirements and the areas where there is flexibility for bidders to propose alternatives/ variations. Where alternatives/variations to BEIS's suggested approach are recommended, bidders must provide a rationale for how this will better answer the research questions and objectives. If bidders agree with the suggested approach, they should provide a detailed explanation of why this approach is best for answering the research questions, which demonstrates their understanding of the research requirements.

A mixed methods approach is essential to answer our research questions and achieve our objectives. Approaches must combine quantitative data from a high-quality survey representative of host communities, enabling generalisable conclusions to be drawn about different groups' views, supported by qualitative research with purposively sampled members of host communities, to explore topics in more detail and to triangulate survey findings. The qualitative element of the research should utilise group methods such as workshops or focus groups so that recommendations for future community benefits schemes can be collaboratively developed with communities. Bidders may also propose additional activities which can strengthen the project and can be delivered within budget and timelines, though this is not essential.

We are open to alternative phasing of data collection activities; therefore, the phasing below is only indicative.

- Phase 1: Host communities survey
- Phase 2: Qualitative research with purposively sampled members of host communities

#### **Phase 1 – Host Communities Survey**

- We require a high-quality representative survey to develop our quantitative evidence base regarding host communities' views and preferences towards proposed electricity transmission network infrastructure projects and community benefits schemes. We expect this will be the first primary data collection activity, with subsequent research activities building on these findings and testing results with different groups. We are open to suggestions for alternative phasing.
- The research questions and sub-questions provide steers on the areas of focus for the survey and contractors will be expected to work closely with BEIS to develop data collection tools. Bidders should outline how they will work with BEIS to develop data collection tools. The survey will comprehensively collect data on potential host communities' views and preferences towards different community benefits approaches (e.g. community funds and direct benefits) and design features for benefits schemes, in addition to informing the level of benefit that schemes could provide. The survey should also explore the extent to which benefits schemes may affect acceptability of network infrastructure projects.
- We are open to suggestions on how the survey can be used to assess how acceptance of network infrastructure projects varies under different community benefits conditions (e.g. value of benefits, types of benefits, delivery methods).

- Bidders may also want to consider how images could be incorporated into the questionnaire to understand participants' responses to visual features of electricity transmission network infrastructure.
- Bidders should set out full details of their suggested method(s) of analysis for any data collected and explain how this will be used to answer the research questions. At a minimum cross-tabulations and significance testing is required. However, we welcome proposals that could offer more complex statistical analysis to robustly answer our research questions. This could include, but is not limited to, ANOVA testing, regression analysis and factor analysis, to understand what variables drive differences across groups.
- Bidders should specify and describe how they will treat any missing values or non-responses, and the way in which they will decide how to treat outliers to collected data within analysis. Bidders should outline how analysis will be quality assured and how potential sources of biases will be mitigated.
- We welcome suggestions from bidders on key sub-groups of interest; we expect demographics, income, housing, experiential and attitudinal factors to influence views. Therefore, we will need to collect relevant background information via the survey to enable group comparisons and to understand our sample. Where possible background questions should align with other key BEIS evidence sources such as the Public Attitudes Tracker and English Housing Survey.
- We expect the study could be conducted online via a push-to-web methodology. We acknowledge the limitations of a push-to-web methodology and welcome input from bidders on how to reduce these; this should include consideration of approaches to within household selection. Bidders may propose alternative survey modes which they believe to be superior and can demonstrate meet budgetary and project requirements.
- We expect that the survey will be subject to cognitive testing.
- Consent should be taken from survey participants to participate in the qualitative phase of this research and potential future research.
- Bidders should outline whether they expect incentives to be required. If incentives are proposed the suitable amount and type of incentive should be outlined. Bidders should ensure incentives are only used if necessary and in line with GSR Ethical Guidance.<sup>16</sup> Any incentives must be costed within the total budget available for this project.
- When reporting survey findings, the projects and the communities should be anonymised – i.e. it should not be possible to attribute any results to a particular project or community. This is required for all internal and external outputs (interim and final), including presentations, reports and datasets. Bidders should outline their approach to this.

### **Phase 1 Sampling – further information**

- It is important that the survey is undertaken with communities where electricity transmission network infrastructure projects are proposed, as it is vital we understand how communities feel in the context of real proposed projects, rather than hypothetical projects.
- In the context of this survey, 'host communities' refers to households within a defined geographical boundary from proposed electricity transmission network infrastructure projects.

<sup>16</sup> <https://www.gov.uk/government/publications/ethical-assurance-guidance-for-social-research-in-government>



- It is essential that the survey samples households within potential host communities surrounding at least two projects listed in Table 1 (see background section). It is an essential requirement that data are representative of the host communities sampled and that we have enough responses to undertake statistical analysis to assess differences between groups and the projects sampled. We welcome bidders' recommendations here, which could involve a different approach and a different number of projects being sampled, as long as our requirements are met. Bidders must demonstrate how their approach meets these requirements.
- It should be noted that subsequent qualitative research with potential host communities of other projects not covered in the survey is expected to be used to triangulate and test findings in different contexts as we do not expect it to be feasible to sample all planned projects in the survey.
- We estimate a minimum requirement of 1,000-1,200 responses in total, depending on the number of projects sampled. Bidders should outline their proposed sample sizes, estimated margins of error (at 95% confidence level) and should explain how these have been calculated. Bidders should also outline how the sample sizes will be sufficient to undertake any statistical analysis they propose. Bidders may want to consider the use of multiple weights so that the data can be analysed at a project level and pooled for analysis as a single sample.
- We require a high-quality sample frame, such as the Postal Address File (PAF). It is vital steps are taken to ensure findings are representative of the host communities sampled with biases minimised; it is likely that stratification and weighting will be required. A random probability sampling approach is essential. In their responses, bidders should cover how representativeness will be achieved and how they will mitigate the risk of sampling biases. We believe a random probability sampling approach is required to meet our requirements and have a strong preference for this sampling approach; if alternative approaches are proposed, bidders should explain the benefits and weaknesses, and demonstrate how the proposed approach would meet the project's requirements.
- Using the list of proposed electricity transmission network infrastructure projects provided in Table 1, bidders should outline their sampling approach in detail. Bidders should provide the rationale for selecting particular projects and for the number of projects selected (two minimum). Bidders should also outline how they will identify potential host communities surrounding these projects (e.g. the geographical boundaries and criteria for assessing where bidders expect impacts may be experienced) and how they will develop their sampling frame for these communities.
- Bidders should outline the target number of responses from each project and demonstrate how they will ensure representativeness to the population, for example through stratified random sampling and weighting.
- It should be noted that the exact locations of proposed projects have not been confirmed, therefore it will only be feasible to estimate host communities for the survey based on National Grid ESO's interactive map<sup>17</sup> and other sources bidders can identify in the public domain.
- The winning bidders will be expected to work with BEIS to finalise the sampling frame before implementing the survey.

### **Phase 2: Qualitative research with host communities**

**Bidders must set out in detail their proposed qualitative research approach; this should include discussion of how their design will achieve project objectives.**

<sup>17</sup> <https://www.nationalgrideso.com/future-energy/the-pathway-2030-holistic-network-design/interactive-map>

**Bidders must also set out their approach to sampling, including their rationale. Further requirements are outlined below.**

- We require a phase of qualitative research to achieve the following:
  - a) Build on emerging findings from the phase 1 survey, through in-depth discussion of views and experiences of purposively sampled key groups of interest.
  - b) To triangulate and test the survey findings with host communities of proposed projects not sampled in the survey.
  - c) To collaboratively develop ideas for how community benefits schemes could be designed and implemented.
- We welcome bidders to propose their own design for this qualitative phase of the project which they can demonstrate achieves our objectives to the highest standard within the budget available.
- Whilst there is significant flexibility, bidders should note that it is essential that their approach includes an element of in-person interactive group activity/ data collection (e.g. workshops, focus groups) with members from host communities of potential projects, to achieve the community collaboration objective. We expect that these in-person activities would be held in a convenient location within the communities of interest. However, bidders should propose the locations they feel most appropriate and should provide the rationale for this. Bidders should note that all costs relating to these activities, such as travel costs, location rental costs and participant incentives/ expenses must be costed for within the total budget available.
- Bidders should outline how their approach will achieve our objectives and how they will build on findings from subsequent phases of data collection.
- Bidders should outline and provide rationale for the number of data collection activities they are proposing (i.e. number of interviews, focus groups, workshops), the modes of data collection, and duration of data collection activities.
- For group activities, bidders should also outline details including: the number of participants per session, the composition of groups, the location of in-person events and consideration of how they will ensure diverse viewpoints are represented ensuring the loudest voices are balanced.
- Bidders should outline what expertise will be utilised to deliver these sessions, including how they will be facilitated and moderated. This should include demonstration of expertise managing sensitive topics and managing participants with diverse and strong views. We expect that expertise in domains such as public engagement, workshop facilitation, deliberative methods and co-design will be vital to delivering effective sessions and producing impactful outputs.
- Bidders should outline how they will work with BEIS to develop data collection tools and group activities. Research questions provide steers on areas of interest.
- Bidders should outline their approach to analysing qualitative data (e.g. thematic analysis) and synthesising ideas generated from the group activities. Bidders should outline how analysis will be quality assured and how potential sources of biases will be mitigated.
- We expect that all/majority of this qualitative data collection would take place after the community survey, however we are open to alternative phasing which better achieves project objectives.
- Bidders should outline whether they expect incentives to be required. If incentives are proposed the suitable amount and type of incentive should be outlined. Bidders should ensure incentives are only used if necessary and in line with GSR Ethical

Guidance.<sup>18</sup> Any incentives must be costed within the total budget available for this project.

- When reporting findings, the projects and the communities should be anonymised – i.e. it should not be possible to attribute any results to a particular project or community. This is required for all internal and external outputs (interim and final), including presentations, reports and datasets. Bidders should outline their approach to this.

## **Phase 2 Sampling**

- There are two groups to be sampled in this phase of the research; bidders should outline how they will identify and recruit participants.
  1. Communities/ individuals with proposed electricity transmission network infrastructure projects in their areas who were sampled for the survey. It should be possible to recruit some participants from those who completed the survey; consent for follow-up should be taken from survey participants.
  2. Communities/ individuals in areas with proposed electricity transmission network infrastructure projects who were not sampled for the survey
- It is important that potential host communities from as many of the proposed electricity transmission network infrastructure projects listed in Table 1 as possible are represented in this phase of the research. This is because survey findings should be triangulated widely and to ensure input into this research from as many communities as possible.
- Bidders should outline the projects they plan to sample for this phase, how they will identify surrounding host communities (e.g. geographical boundaries) and recruit participants. The rationale for these decisions should also be provided.
- A purposive sampling approach is required. Bidders should provide an outline of the potential composition of their sampling frame, including the rationale for this approach. This should be broken down by variables of interest, which could include demographics and/ or attitudes. This should also be broken down by the data collection activities. For example, if focus groups and interviews are recommended, bidders should outline the sample frame for both of these data collection activities.
- The composition of the purposive sample frame will be finalised between BEIS and the winning bidders. This final sample frame should be informed by findings from the survey, which should highlight key groups to focus on.

## **4. Deliverables**

### **Deliverables**

#### **Phase 1: Host communities survey**

- Questionnaire
- Raw survey data to enable secondary analysis.
- Publishable survey data tables
- Interim findings slides outlining top-level findings from the survey. These will be presented by contractors to BEIS and other stakeholders.

<sup>18</sup> <https://www.gov.uk/government/publications/ethical-assurance-guidance-for-social-research-in-government>

## Phase 2: Qualitative research with host communities

- Data collection tools (e.g. interview topic guides, group activities, workshop slides etc)
- Interim findings slides outlining top-level findings emerging from qualitative research activities. This should include recommendations arising from community developed options arising from group activities. These will be presented by contractors to BEIS and other stakeholders.

### Final output

- Final quality assured written report of publication quality, consolidating findings across the project (including executive summary and technical annex including methodologies, sampling approach, topic guides and questionnaires). Annex 1 outlines report writing guidance.
- Final presentation of results: presentation of slides outlining findings from the final report including focus on recommendations.

### Reporting and presentations

Bidders should outline their proposed approach to reporting and disseminating findings. After each wave of data collection, contractors will be expected to provide a presentation of the results. Interim outputs will also require BEIS sign-off.

Contractors will also be expected to provide a presentation at the close of the project on the final report. Attendees are likely to include BEIS stakeholders and other stakeholders involved in the project. Presentations are likely to take place online via MS Teams.

We encourage the development of visually engaging elements within outputs (e.g. slides and reports), such as utilising diagrams and infographics where possible, with the view of increasing engagement with findings and the ease of dissemination.

### Timings

Indicative timings for this project are outlined below. Due to the tight timelines, bidders must demonstrate they have the resources to deliver the project at the pace required.

Milestone	Month completed (estimate)
Start contract	February 2023
Phase 1 outputs	April/May 2023
Phase 2 outputs	May/June 2023
Final report signed-off	June/July 2023

### Quality assurance

Bidders must set out their approach to quality assurance (QA) in their response to this ITT with a QA plan. Sign-off for quality assurance must be conducted by someone sufficiently senior within the contractor organisation to be able to take responsibility for the work submitted. Acceptance of the work by BEIS will take this into consideration. BEIS reserves the right to refuse to sign-off outputs which do not meet the required standard specified in this invitation to tender and/or the contractor's QA plan. QA should cover all aspects of the project undertaken by the contractors, including data collection, data analysis and reporting.

To demonstrate an effective process to produce high quality reporting, the contractor/s must ensure that quality assurance is done by individuals who were not directly involved in that research, analysis, or reporting process.

Bidders should note that BEIS may appoint its own peer reviewer(s). Consideration should be given to how the external peer reviewer(s) will be included, for example in the QA process.

Where complex or innovative methods are proposed, bidders should specify how additional quality assurance will be provided. Where necessary, this should include the use of external experts. A BEIS-appointed peer reviewer will not be expected to provide detailed quality assurance as their role will be focused on higher level peer review.

Outputs will be subject to BEIS internal approvals, and the more substantive the output the longer the approval time required. Published outputs will require at least two rounds of comments, which should be factored into timelines.

The successful bidder will be responsible for any work supplied by sub-contractors. For primary research, contractors should be willing to facilitate BEIS research staff attending interviews, focus groups and workshops as part of the quality assurance process if appropriate.

Other useful sources of guidance and advice that will help bids and the resulting work be of the highest quality include:

- The [Government Social Research Code](#), in particular those that relate to GSR Products
- [Quality in Qualitative Research: A Framework for assessing research evidence](#) provides a Framework for appraising the quality of qualitative research

### **Working arrangements**

The successful contractor will be expected to identify one named point of contact through who all enquires can be filtered. A BEIS project manager will be assigned to the project and will be the central point of contact.

Where a consortium or sub-contractors are in place, BEIS expect that they are included in relevant meetings, workshops, and review points to ensure their full engagement in the project. All contractors and sub-contractors are responsible for the delivery of outputs to the appropriate time and quality. It is expected that the lead contractor takes an active role in oversight of all workstreams and bears the overall responsibility for the delivery of the evaluation activities and outputs.

It is important that BEIS are kept informed of emerging findings and project progress.

Bidders should assume that BEIS take an active role in review and quality assurance of research materials, analysis, and outputs, beyond external peer review. It should be expected that research materials and outputs go through at least three iterations (i.e., two rounds of comments from BEIS), dependent on the complexity of the product. Additional amendments may be required for published outputs.

We expect the winning bidder to be available to attend an inception meeting as soon as possible after the contract has been signed, ideally within the same week the contract is

signed.

We envisage the need for close interaction between the BEIS Project Manager and contractor throughout the process, to ensure that emerging issues are dealt with promptly and that BEIS fully understand the assumptions and approach taken. Bidders should assume that engagement with BEIS will include weekly project management phone calls, weekly progress update reports via email, steering group meetings (frequency to be confirmed), and any ad hoc meetings as required to design and deliver the project. Throughout the project, BEIS will review and sign off all final data collection instruments, analytical approaches (including key assumptions) and outputs.

### **Resourcing, skills and expertise**

We will require you to demonstrate that you have the necessary expertise and capabilities to undertake the project. This should include expertise and capabilities delivering the research methods and analytical methods outlined in your tender. Your tender response should include a summary of the project team's skills and capabilities, demonstrating the relevant social research skills and expertise in the policy area. Academic and/or expert practitioner expertise in the areas of community engagement and community benefits would be highly beneficial.

In their response, bidders should demonstrate appropriate resourcing to meet the demands of the project. A table should be provided outlining key tasks for staff/ collaborators working on the project, their day rates and the number of days spent on each task.

### **Risks**

Bidders are expected to include a risk register covering potential or anticipated risks and a suitable mitigation strategy. Bidders must consider how these, and any other challenges will be addressed through the project's design and delivery. Two key risks are outlined below,

#### *1) Tight timelines and timing of outputs*

Bidders should outline a clear timetable and approach to delivering this research within the project timelines. Contractors will need to have sufficient resource to set-up quickly due to tight timelines. Bidders should be aware that flexibility in timings may be required.

#### *2) Local considerations and the planning process*

Government recognises that individual/community views on infrastructure projects in their local area need to be taken into account through the planning process. Bidders should outline how they will advise participants on the separation of this research from the planning process and direct participants to the appropriate channels within the planning process.

#### *3) Community and individual views on proposed projects*

As noted, we intend for sampling to cover proposed projects rather than hypothetical projects. It is the responsibility of the lead developer to engage with the local community as part of the planning process. Therefore, bidders should outline how they will approach surveys and engagement with the local community and individuals to avoid influencing perceptions of the project.

### **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 'consideration of challenges' criterion.

We expect contractors to adhere to the following Government Social Research (GSR) Principles:

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

GSR Ethical Guidance can be found in full online.<sup>19</sup>

### **Data security**

The successful tenderer must comply with UK GDPR and any information collected, processed and transferred on behalf of the Department, and in particular personal information, must be held and transferred securely. Contractors must provide assurances of compliance with the GDPR and set out in their proposals details of the practices and systems they have in place for handling data securely including transmission between the field and head office and then to the Department. Contractors will have responsibility for ensuring that they and any subcontractor who processes or handles information on behalf of the Department is conducted securely. Contractors will be expected to hold security accreditation in line with HMG security standards, and to undertake such practices as to observe the confidentiality of sensitive data that may be shared with them. The sorts of issues which must be addressed satisfactorily and described in contractors' submissions include:

- procedures for storing both physical and system data;
- data back-up procedures;
- procedures for the destruction of physical and system data;
- how data is protected;
- data encryption software used;
- use of laptops and electronic removable media;
- details of person/s responsible for data security;
- policies for unauthorised staff access or misuse of confidential/personal data;

<sup>19</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1000708/2021-GSR\\_Ethics\\_Guidance\\_v3.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1000708/2021-GSR_Ethics_Guidance_v3.pdf)

- policies for staff awareness and training of DPA;
- physical security of premises; and
- How research respondents will be made aware of all potential uses of their data.

### **Price and payments**

The maximum budget for this project is £120,000 excluding VAT. Cost will be a criterion against which bids will be assessed. Contractors should provide a full and detailed breakdown of costs. This should include staff (and day rate) allocated to specific tasks.

In submitting full tenders, suppliers 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.

BEIS aims to pay correctly submitted invoices as soon as possible, within 30 days from the date of receipt, in line with standard terms and conditions of contract.

The indicative milestones and phasing of payments will be agreed at the project inception meeting. A provisional phasing is detailed below:

<b>Milestone</b>	<b>Date Estimate</b>
Phase 1 setup and fieldwork	March/April 2023
Completion of Phase 1 reporting	April/May 2023
Completion of Phase 2 fieldwork and reporting	May/ June 2023
Final report signed-off	June/July 2023

### **Terms and Conditions**

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



## Section 5 – Evaluation of Bids

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

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

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

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

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	SEL1.10	Information security requirements
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW6.3	Non-Disclosure Agreement Part 1
Qualification	AW6.4	Non-Disclosure Agreement Part 2
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote response received on time within the Jaggaer eSourcing Portal
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

## Scoring criteria

### Evaluation Justification Statement

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

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	15%	15%
Technical	PROJ1.1	Approach/ Methodology	85%	35%
Technical	PROJ1.2	Understanding the Project Environment		17.5%
Technical	PROJ1.3	Staff to Deliver, Project Plan and Timescales		22.5%
Technical	PROJ1.4	Risk Management and Quality Assurance		10%

## Evaluation of criteria

### Non-Commercial Elements

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

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

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

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

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

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

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

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

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

### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

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

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

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

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 Commercial criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

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

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

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

## Evaluation process

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

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

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

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

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

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

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

## Section 7 – General Information

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

#### DO:

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

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

### DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting 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 the Jaggaer eSourcing portal. Responses received by any other method than requested will not be considered for the opportunity.

## Some additional guidance notes

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

**Phone** 08000 698 632

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

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

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

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



- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Jaggaer eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliance checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliance 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 Jaggaer eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

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

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

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

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

## USEFUL INFORMATION LINKS

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

## **8.0 Freedom of information**

- 8.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by 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.

## **9.0. Timescales**

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

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

- 10.1 Unless stated otherwise in these Instructions or in writing from 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 eSourcing tool to the designated UK SBS contact.

- 10.2 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the Jaggaer eSourcing portal. Failure to follow this requirement will result in disqualification of the Response.

## Appendix A – Glossary of Terms

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

