



# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of Innovate UK**

**Subject Contracting Authority: Innovate UK Market Intelligence**

**Sourcing reference number UKSBS BLOJEU – CR17090INN**

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

Registered in England and Wales as a limited company. Company Number 6330639.  
Registered Office Polaris House, North Star Avenue, Swindon, Wiltshire SN2 1FF  
VAT registration GB618 3673 25  
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**UKSBS**  
  
*Shared Business Services*

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## Section 1 – About UK Shared Business Services

## Putting the business into shared services

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

It is our vision to become the leading service provider for Contracting Authorities for 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](#).

## Section 2 – About the Contracting Authority

## *Innovate UK*

The Innovate UK is the UK's innovation agency – driving innovation to boost economic growth. It works with people, companies and partner organisations to find and drive the science and technology innovations that will grow the UK economy

Innovate UK is an organisation of around 300 staff, drawn mainly from business. It works across the UK, with a head office in Swindon.

With a strong business focus, Innovate UK drives growth by working with companies to de- risk, enable and support innovation. To do this, they work to:

- Determine which science and technology developments will drive future economic growth
- Meet UK innovators with great ideas in the fields they're focused on
- Fund the strongest opportunities
- Connect innovators with the right partners they need to succeed
- Help its innovators launch, build and grown successful businesses

Since 2007 Innovate UK has committed over £1.8 billion to innovation, matched by a similar amount in partner and business funding. They have helped more than 7,600 organisations with projects estimated to add more than £11.5 billion to the UK economy and create 55,000 extra new jobs

## 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	Innovate UK, Polaris House, North Star Avenue, Swindon, SN2 1FL
3.2	Buyer name	Kerry Hammond
3.3	Buyer contact details	<a href="mailto:Research@uksbs.co.uk">Research@uksbs.co.uk</a>
3.4	Estimated value of the Opportunity	Up to £108,000.00 ex VAT including the optional 1 year extension  Maximum year 1 budget £54,000.00 excluding VAT Maximum year 2 budget £54,000.00 excluding VAT
3.5	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <a href="#">here</a>. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b>

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	02/08/2017 Location: Contracts Finder
3.7	Latest date/time ITQ clarification questions shall be received through Emptoris messaging system	11/08/2017 14.00hrs
3.8	Latest date/time ITQ clarification answers should be sent to all Bidders by the Buyer through Emptoris	16/08/2017
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	22/08/2017 14.00hrs
3.10	Anticipated selection and de selections of Bids notification date	31/08/2017
3.11	Anticipated Award date	31/08/2017

3.12	Anticipated Contract Start date	01/10/2017
3.13	Anticipated Contract End date	30/09/2019
3.14	Bid Validity Period	60 Days

## Section 4 – Specification

### **Background**

Innovate UK funds, supports and connects innovative businesses to accelerate sustainable economic growth. With a strong business focus, we drive growth by working with companies to de-risk, enable and support innovation. To do this, we work to:

- *determine which science and technology developments will drive future economic growth*
- *meet UK innovators with great ideas in the fields we're focused on*
- *fund the strongest opportunities*
- *connect innovators with the right partners they need to succeed*
- *help our innovators launch, build and grow successful businesses*

### **The customers:**

The provision of market research to the organisation has two primary customers:

- The InnovateUK Markets & Insights team whose role is to evaluate and analyse market and technology opportunities using official data, scientific and patent literature and the best available market intelligence. The team has developed and implemented evaluation models to help the organisation prioritise and select areas for investment. These models provide senior decision makers in the organisation with insights that enable them to make comparative judgements across very different markets and technology domains. The Markets & Insights team are also responsible for conducting in-depth market reviews in potential new areas of activity, which requires them to be able to access market intelligence from a range of sources.
- Across Innovate UK more broadly, specialist technologists are responsible for developing innovation support programmes, which requires them to have a thorough understanding of global value chains and the UK's relative competitiveness in their areas of specialism. All of the decisions Innovate UK makes about areas for investment (or other forms of innovation support) are therefore underpinned by objective, third-party market intelligence from credible, authoritative sources.

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

The ability to identify emerging trends, technologies and market opportunities is critical to Innovate UK's success as the UK's innovation agency. The aim of this tender exercise is to support strategic decision-making at Innovate UK through access to relevant, timely and credible intelligence about markets and technologies. It is recognised that suppliers may

choose to focus their efforts on market or technology analysis. We ask that suppliers are clear in the bid on which side of this spectrum their service provision is. Innovate UK reserves the right to choose multiple suppliers who are able to meet the specific requirements more completely than a single supplier – please see section ‘4. Deliverables’ for more information on this point.

## **Objectives**

The objectives of this tender exercise are to:

- Support Innovate UK in identification, prioritisation and selection of areas for investment through access to credible and authoritative intelligence on a broad range of markets and technologies.
- Enable Innovate UK to keep abreast of relevant developments in technologies and markets.
- Enable Innovate UK to identify leading countries, research organisations and companies in relevant areas of technology and innovation.
- Ensure Innovate UK is aware of predicted long-term economic, societal and technological trends and their potential impact both globally and in the UK
- Enable Innovate UK to investigate potential new areas for investment through access to reports, data and specialist analysts.

## **Suggested Methodology**

### **The requirement**

The scope of the tender exercise is the provision of market and technology intelligence to support decision-making. The following areas are within scope of the tender exercise and should be covered by bidders:

### ***Shall - Requirement***

[1] The bidder shall provide enterprise wide access to a significant ‘library’ of report literature that in its entirety covers a very broad range of innovation-driven markets with a global outlook, but which contain a high degree of UK sector knowledge. Sectors covered should include as a minimum:

- Urban environment, smart cities & infrastructure
- Energy and resources
- Digital (including communications, instrumentation and cyber security)
- Automotive
- Space and Aerospace
- Advanced Materials
- High Value Manufacturing

- Healthcare, Medicine and Pharmaceuticals

- Agricultural Production and Food

- Biotechnology & Chemicals

[2] Reports shall be focussed on a specific market or market segment, either global in coverage or focussed on specific territories. Reports should be based on a combination of primary and secondary market research.

[3] The majority of reports shall include estimated market revenues and forecast market growth.

[4] A section of the available reports shall contain analysis and identification of leading edge companies, business models and underpinning technologies in the aforementioned sectors. Bidders are advised to indicate the volume and frequency of report updates available.

[5] The winning supplier shall provide telephone support for all Innovate UK staff on request to enable effective induction and use of the web portal

[6] The winning supplier shall provide a dedicated account manager, available via telephone/email to handle new user registrations, scheduling analyst calls, coordinating on-site briefings and any other account management queries that arise

[7] The winning supplier should provide information about long-term societal, economic and technological trends, including the potential impacts of these trends both in the UK and globally.

[8] The winning supplier should provide access to expert analysts who are available to discuss report findings, answer questions and provide insights in addition to the content of the report literature.

[9] The winning supplier should provide coverage of the UK market covering aspects such as leading and emerging company profiles, trends, and market revenue and growth figures.

[10] The winning supplier could provide access to technology and market insights providing brief updates on key global developments across a range of science and technology domains. These insights should be timely, to enable specialists at Innovate UK to keep abreast of developments in their areas of expertise.

[11] The winning supplier may provide a number of on-site or remote briefings on topics of specific interest to Innovate UK.

### **Excluded components**

The following are excluded from this tender exercise:

- The delivery of new, bespoke primary market research specifically conducted for Innovate UK. The scope of this tender exercise covers published report literature and insights along with access to expert analysts as described above. There is no provision within this tender for the delivery organisation to conduct new primary research on behalf of Innovate UK.

## **Deliverables**

The provision of market and technology intelligence services to Innovate UK will begin on 1<sup>st</sup> October 2017 and will continue for a 12 month delivery period without break. Subject to evaluation, there will be an option to renew for a further 12 months at the end of the first 12-month period.

Note: This contract will be awarded for the initial term of 1 year. Innovate UK retain the option to extend the project for a further year if they feel that the desired outcomes are being met. This decision will be made by Innovate UK prior to completion of the First year. Year 2 budget is subject to confirmation upon agreed extension of the contract – but is nominally equivalent to year 1. For the purpose of the price evaluation, bids will be assessed on the price given for both years 1 and 2.

Innovate UK reserves the right to award to multiple contracts resulting from this tender process if it is felt the requirements of the contract can be more completely met by multiple providers rather than a single provider. The overall budget will remain the same and providers are advised to bid accordingly – making sure to indicate which requirements they feel are fully met by their service provision and those which are not.

## **Intellectual Property**

Innovate UK recognizes that ownership of IP shall remain the property of the supplier and that in providing the service the supplier is allowing Innovate UK usage rights of the material for internal purposes. Suppliers should recognise that material and references are likely to be used in documentation which will occasionally be shared with other government departments and may occasionally be made public under Freedom of Information (Fol) requests. Furthermore suppliers should recognise that material used in such documents will remain in perpetuity beyond the life of the contract.

## **Terms and Conditions**

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

## Section 5 – Evaluation model

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

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

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

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Quality	AW6.1	Compliance to the Specification
-	-	Invitation to Quote – received on time within e-sourcing tool

Scoring criteria			
<b>Evaluation Justification Statement</b>			
In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.			
Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20.00%
Quality	PROJ1.1	Understanding the Environment	20.00%
Quality	PROJ1.2	Staff to Deliver	10.00%
Quality	PROJ1.3	Approach	40.00%
Quality	PROJ1.4	Project Plan and Timescales	10.00%

## Evaluation of criteria

### Non-Price elements

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

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

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

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

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

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

0	The Question is not answered or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score.

### Example

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

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

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

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

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

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

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

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

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

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

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

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

## **Section 6 – Evaluation questionnaire**

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

Guidance on completion of the questionnaire is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

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

## Section 7 – General Information

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

#### DO:

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

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

### DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 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.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 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.
- 7.16 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

## Some additional guidance notes

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority. / UKSBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 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
- 7.33 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.34 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.
- 7.35 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.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.38 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of

any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.39 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 Emptoris.
- 7.40 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.

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

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

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

## USEFUL INFORMATION LINKS

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)
- [Contracts Finder](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)