



Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Research and Innovation (UKRI)

Subject: An exploration of changes to the cost of research in UK research performing organisations

Sourcing Reference Number: PS22246

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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.uksbs.co.uk/use/pages/privacy.aspx>

For details on how the Contracting Authority protect and process your personal data please follow the link below:

<https://www.ukri.org/privacy-notice/>

Section 2 – About the Contracting Authority

UK Research and Innovation

Operating across the whole of the UK and with a combined budget of more than £6 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit: www.ukri.org

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	UK Research and Innovation Polaris House North Star Avenue SN2 1FL
3.2.	Buyer name	Nicola Turner
3.3.	Buyer contact details	ProfessionalServices@uksbs.co.uk
3.4.	Estimated value of the Opportunity	£50,000.00 excluding VAT
3.5.	Process for the submission of clarifications and Bids	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.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Monday, 22 August 2022 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Friday, 09 September 2022 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Monday, 12 September 2022
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (the Deadline)	Friday, 16 September 2022 14:00
3.10.	Date / time Bidders should be available if face to face clarifications are required	Week Commencing 3 rd October 2022
3.11.	Anticipated notification date of successful and unsuccessful Bids	Monday, 10 October 2022
3.12.	Anticipated Contract Award date	Monday, 10 October 2022
3.13.	Anticipated Contract Start date	Monday, 24 October 2022
3.14.	Anticipated Contract End date	Friday, 31 March 2023
3.15.	Bid Validity Period	90 Days

Section 4 – Specification

1. Introduction

Context

The UK's research and innovation system tackles national and global challenges, supports economic growth, productivity and cultural richness, and fosters private R&D investment.

In order to remain sustainable, our research and innovation system must be able to meet present R&D needs without depleting its ability to meet future needs (as set out in the [Government's R&D roadmap](#), [Plan for Growth](#) and [Innovation Strategy](#)). Achieving this requires sufficient financial inputs as well as a critical mass of talent and capability, a thriving research environment, and action to address environmental sustainability.

However, as the Government advances its plans to make the UK a science superpower and increase public spending on R&D, research-performing organisations are reporting financial pressures associated with covering long-term costs and investing in the underpinning capability needed to respond quickly to new opportunities and priorities, and research leaders have expressed concern that the costs of research are rising faster than inflation.

UKRI supports research sustainability

UK Research and Innovation (UKRI) is the UK's largest public funder of research and innovation, spanning all disciplines and sectors, and delivering a portfolio of investments that drives economic, social, environmental and cultural benefits.

As the national and international landscape for R&D evolves, UKRI plays a key role in shaping and supporting the UK's research and innovation system. Our Research Sustainability (RS) Team is working to understand the financial pressures on the system so that we can address and respond to factors that may affect sustainability.

Our analysis of [Transparent Approach to Costing \(TRAC\)](#) data has revealed a consistent year-on-year increase (above the rate of inflation) in the full economic cost of research in universities. TRAC guidance¹ defines the direct and indirect costs associated with the research as follows:

- Direct costs are those that are incurred solely as a direct consequence of undertaking a particular activity and can be attributed directly to an individual project, programme or activity, or are shared between a few projects or programmes.
- Indirect central support costs are incurred across the whole institution and cannot typically be directly charged to a specific activity or project. Indirect central costs are subclassified into indirect and estates costs, and are attributed to academic departments, and activities.
- Indirect support costs are incurred in academic departments in carrying out research activities but are not incurred solely as a result of undertaking one specific activity and cannot be directly and wholly charged to a specific activity or project.

¹ Descriptions adapted from TRAC 2020/21 guidance para 3.1.3 <https://www.trac.ac.uk/wp-content/uploads/2021/09/TRAC-guidance-v2.6-3-TRAC-process.pdf>

Whilst a recent study identified which subject areas have the highest expenditure, we have not found a single reliable, unified data set that looks into the differential costs of research. Also, despite OECD data showing that R&D labour costs are increasing, we have been unable to find any studies measuring how the cost of performing research has changed over time or exploring the drivers leading to cost changes. The available data sets on sector expenditure (Appendix A) are not detailed enough to explore trends in the cost of research.

We are therefore interested to understand:

- which disciplines/subject areas are most affected by the increasing cost of research activity
- which types/categories of costs are increasing (e.g., staff costs, research costs, overhead costs)
- which of these costs are increasing by the greatest factor
- what is driving the observed increase in research costs

and are seeking to commission independent advice on the development and demonstration of robust quantitative and qualitative methods that will enable a detailed exploration of changes in the underlying cost of research in UK research-performing organisations that will apply new, creative approaches to investigating this issue.

The methodology should set out a research-based approach for gathering historic information, curating a reliable data set and producing robust evidence (data and analysis) that could be used to explore the drivers of change and the extent to which the costs of research have changed over the past 10 years.

2. Aim & Objectives

Aim

The aim of this study is to develop and demonstrate a methodological approach that will enable UKRI to better understand the underlying costs of research, how these costs are changing over time, and the drivers behind the observed trends. It will provide robust evidence (quantitative data and qualitative analysis) of the drivers of change and the extent to which the costs of research have changed over the past 10 years.

Bidders should develop a proposal that outlines a robust methodology that would support an exploration of the changing costs of research in UK universities and UKRI-funded research institutes.

Following on from the areas of interest outlined in the previous section, bidders should show initiative in suggesting mixed-method approaches that seek to provide robust evidence to address one or more of the following lines of inquiry:

- which categories of research costs are increasing (e.g. staff costs, equipment costs, etc.)?
- what are the main factors driving changes to the costs of research (e.g. changes in research methods, inflation, etc.)?
- is the nature of research activity changing (e.g. increasing digitisation, higher-throughput data collection and processing) and affecting the costs of research?
- are there any differential cost increases between subject areas or disciplines? (NB: bidders may wish to suggest whether their methodology could focus on a deep-

dive of subjects within one academic discipline, or draw comparison between broader disciplinary areas)

Objectives

The purpose of this study is to develop a methodological approach and explain the likelihood that using this method could enable UKRI to answer the following questions:

1. What is the 'estimated unit cost of research activity' across/within a range of disciplines/subject areas?
2. How has the 'estimated unit cost of research activity' changed over time?
3. How has the 'estimated unit cost of research activity' changed in different disciplines/subject areas?
4. What are the drivers behind any observed trends in the changing cost of research activity?
5. How are these drivers affecting the pricing of research activities and the full economic cost of research?
6. To what extent does each driver contribute to the overall trends observed?
7. Do the disciplinary/subject area trends differ between types of research-performing organisation (i.e. universities and UKRI-funded research institutes)?

3. Scope

Approach

This study will develop a mixed-methods approach and indicate its utility for exploring changes in the costs of research activity in UK research-performing organisations (i.e. universities and UKRI-funded research institutes). Bidders should set out their proposal to develop a detailed methodology, how they will approach the identification of a set of organisations for their methodology, the qualitative and quantitative data they would use and their plan for data acquisition and analysis. We welcome creative approaches that could either take a systematic look across the sector or 'deep dive' into a few research-performing organisations.

A key challenge will be acquiring data at the necessary scale and granularity required to report robust conclusions whilst controlling for changes in research practice and requirements that may change over time and vary by discipline/subject area. We acknowledge the constraints of using existing datasets but do not anticipate that the study will require the collection of new data – rather the method should focus on repurposing existing data from reliable sources, in order to minimise burden on the sector. Bidders should explain how they intend to use existing data provided by research-performing organisations to curate a new, reliable dataset to support the demonstration of their methodology.

We are interested in understanding cost changes across the full range of range of goods (including equipment, infrastructure, consumables etc.) and services (including academic and technician salaries, scholarly communication, equipment servicing etc.) associated with undertaking research. Bidders are invited to consider whether to focus their methodological approach on one of these goods and services or to take a broader look across the full range. Bidders are also asked to consider whether their methodology could identify a 'basket of indicators' that would allow for comparison of research costs over time.

We acknowledge the challenge in differentiating longer-term trends in underlying costs from the current rapid increase in costs due to inflation. Bidders should consider this in their responses.

As part of the evaluation process to select and appoint consultants for this work, suppliers may be invited to a clarification interview to validate points on their methodology and approach. If invited to a clarification interview, we request that the Project Director, Team Leader and Senior Analyst (or equivalent roles) attend. These interviews will take place online (over zoom).

Schedule of work

The project should begin in Autumn 2022 and the estimated timeframe for delivery and completion of the work is 3-4 months. Bidders should provide a detailed activity plan with key milestones and deliverables.

We expect to hold a kick-off meeting with the successful bidder in October/November 2022 to initiate the work.

We expect bidders to provide a detailed schedule for the work, which sets out the key tasks and deliverables in developing and demonstrating the methodology and curating a robust, reliable dataset.

The work is likely to involve the following elements, as a minimum:

- Developing a project plan for the project with key deliverables and milestones
- Developing the methodological approach that could be used to answer the research questions
- Outlining an approach to data acquisition and analysis to provide robust evidence of the changing costs of research
- Identifying any anticipated challenges to the methodological approach and/or data analysis and proposing how these would be managed or mitigated
- Preparing and submitting a written report that sets out the recommended methodology and data approach
- Providing 'proof of concept' of the methodology to indicate its feasibility for answering the research questions

Following completion of this work, UKRI may wish to commission suppliers (via a further invitation to tender) to undertake a full investigation into the costs of research using the recommended methodological approach. Bidders may therefore wish to take this into account when considering the design of their methodology and proof of concept.

Budget

The project has a total budget of up to £50,000 (excluding VAT) in accordance with the bidder's chosen methodology and approach. Bidders should indicate the costing of each phase of activity alongside the timetable for delivery.

4. Requirement

The outputs of the study, as listed below, should be delivered no later than 13th March 2023:

- A written report setting out the recommended methodology, data acquisition/analysis approach and an assessment of feasibility by 13th March 2023
- An oral presentation of the recommended approach to the Research Sustainability Team and members of our advisory group in March 2023, to include a demonstration of the methodology and initial use of curated data and preliminary findings
- A register of potential risks and anticipated challenges associated with the methodology and data sources and a plan for how these could be managed or mitigated when investigating the costs of research
- The curated data sets from the proof of concept and appropriate data permissions for UKRI to use these to assess the methodological approach
- Recommendations for how the work could be taken forward by UKRI and the RS Team and suggestions for future work

The successful bidder will be expected to fully project-manage the study and organise regular (at least monthly) progress meetings with an identified contact person in the Research Sustainability Team.

The successful bidder must ensure that the work receives appropriate, independent technical and expert review to provide advice, and guide and challenge the research and validate the outcomes. To ensure this, bidders are expected to consult with and provide updates to the Financial Sustainability of Research Group (FSRG), UKRI's appointed advisory group for this project – UKRI will be able to facilitate this.

5. Timetable

A suggested timeline is below. The start date is fixed but all other delivery dates can be flexible depending on suggested approach. In addition to the below, regular progress meetings with the UKRI Research Sustainability Team will be required.

- Mid-late October/ early November 2022: appoint supplier
- Late October/ early November 2022: kick-off meeting between supplier and UKRI Research Sustainability Team
- Late October/ early November 2022: supplier starts work
- March 2023: presentation of report on methodology and data acquisition plan
- March 2023: a proof of concept demonstrating the methodology, initial use of curated data and preliminary findings and submission

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.

After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ($5+5+6=16 \div 3 = 5.33$))

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
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	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
Technical	PROJ1.6	Capacity
-	-	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	20.00%	20.00%
Technical	PROJ1.1	Approach / Methodology	80.00%	40.00%
Technical	PROJ1.2	Staff to Deliver		10.00%
Technical	PROJ1.3	Understanding the Project Environment		20.00%
Technical	PROJ1.4	Project Plan and Timescales		5.00%
Technical	PROJ1.5	Risk Management		5.00%

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.
<p>All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:</p> <p>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 $(60+60+40+40) \div 4 = 50$</p> <p>Once the above evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, if required by the commercial lead, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.</p>	
Commercial Elements will be evaluated on the following criteria.	
<p>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.</p> <p>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.</p> <p>Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.</p> <p>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 $(80/100 \times 50 = 40)$</p> <p>The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.</p> <p>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.</p>	

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"> ITQ logged upon opening in alignment with UK SBS's procurement procedures.

	<ul style="list-style-type: none"> 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.
Compliance check	<ul style="list-style-type: none"> Check all Mandatory requirements are acceptable to the Contracting Authority. Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.
Scoring of the Bid	<ul style="list-style-type: none"> Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	<ul style="list-style-type: none"> The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> 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.
Due diligence of the Bid	<ul style="list-style-type: none"> the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> Submission of insurance documents from the Bidder Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder Taking up of Bidder references from the Bidders Customers. Financial Credit check for the Bidder
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.

Section 6 – Evaluation 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

Call me back

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 2nd 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](#)
- [Equalities Act introduction](#)

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