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Tender

## **Research Appraisal Evaluation and Delivery Framework - Lot 3 Research**

Highlands and Islands Enterprise  
South of Scotland Enterprise Agency

F02: Contract notice

Notice identifier: 2022/S 000-008006

Procurement identifier (OCID): ocds-h6vhtk-03039b

Published 24 March 2022, 1:28pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Highlands and Islands Enterprise

An Lòchran, 10 Inverness Campus

Inverness

IV2 5NA

#### **Email**

[hieprocurement@hient.co.uk](mailto:hieprocurement@hient.co.uk)

#### **Telephone**

+44 1463245245

#### **Country**

United Kingdom

**NUTS code**

UKM6 - Highlands and Islands

**National registration number**

313

**Internet address(es)**

Main address

<http://www.hie.co.uk>

Buyer's address

[http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00313](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00313)

**I.1) Name and addresses**

South of Scotland Enterprise Agency

Carmont House, The Crichton, Bankend Road

Dumfries

DG1 4TA

**Email**

[Finance@sose.scot](mailto:Finance@sose.scot)

**Telephone**

+44 1750535901

**Country**

United Kingdom

**NUTS code**

UK - United Kingdom

## **Internet address(es)**

Main address

<https://www.southofscotlandenterprise.com>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA30448](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA30448)

## **I.2) Information about joint procurement**

The contract involves joint procurement

## **I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

## **I.4) Type of the contracting authority**

Regional or local Agency/Office

## **I.5) Main activity**

Economic and financial affairs

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Research Appraisal Evaluation and Delivery Framework - Lot 3 Research

Reference number

FTS 012

#### **II.1.2) Main CPV code**

- 79300000 - Market and economic research; polling and statistics

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

A new Research, Appraisal, Evaluation and Delivery (RAED) Framework is being procured, with the requirements divided into 3 Lots:

Lot 1 Strategic and Operational Planning/Delivery Support

Lot 2 Appraisal and Evaluation

Lot 3 Research

These frameworks offer HIE staff an efficient, cost-effective, and streamlined approach for procuring external support and expertise to assist in the assessment and delivery of projects, to provide development support, and to provide robust and impartial research and evaluation evidence to support resource allocation and policy development.

This Contact Notice is for Lot 3 which relates to the delivery of research services for HIE and SOSE. For both agencies research requirements will be extremely varied, aimed primarily, but not exclusively, at influencing or informing strategy and policy development within the agencies and across the wider public sector.

Bidders who are interested in bidding for Lots 1-3 can do so by locating the respective PCS notices, which were all published on the same date with Research Appraisal Evaluation and

Delivery Framework' in the contract description. Bidders can submit a response for one or more Lots.

See Scope of Requirements for full details.

### **II.1.5) Estimated total value**

Value excluding VAT: £3,200,000

### **II.1.6) Information about lots**

This contract is divided into lots: No

## **II.2) Description**

### **II.2.2) Additional CPV code(s)**

- 79310000 - Market research services
- 79311100 - Survey design services
- 79311200 - Survey conduction services
- 79311210 - Telephone survey services
- 79311000 - Survey services
- 79311300 - Survey analysis services
- 79311400 - Economic research services
- 79315000 - Social research services
- 79330000 - Statistical services
- 79342311 - Customer satisfaction survey
- 73110000 - Research services
- 73210000 - Research consultancy services
- 79342310 - Customer survey services

### **II.2.3) Place of performance**

NUTS codes

- UKM6 - Highlands and Islands

### **II.2.4) Description of the procurement**

Commissions for this Lot will typically involve a mix of primary (both quantitative and qualitative), secondary and tertiary research. The nature of individual assignments will be tailored to reflect the purpose of each research commission and will include, but not be limited to socio-economic research, panel research, sectoral research, scenario planning, customer research and economic intelligence. Studies may include some element of partnership working and may be sub-regional, regional, national or international in coverage. Target audiences will include businesses, social enterprises, community groups, community residents and public sector partners.

The budget currently available for the initial 3 year period is GBP 2 400 000 (excluding VAT).

This Framework will be available for call-off by HIE and SOSE as well as any other Contracting Authority wholly or partly under the control of, or funded by HIE or SOSE, at any point during the term of this Framework (subject to case-by-case approval by HIE). Other organisations entitled to benefit from the framework will enter into a direct framework agreement with the successful suppliers on the same terms and conditions as those applying between HIE and the suppliers.

The Framework will be non-exclusive i.e., HIE and SOSE reserve the right, in certain circumstances, to procure outwith the Framework, as and when required.

### **II.2.5) Award criteria**

Quality criterion - Name: Cyber Security / Weighting: Pass/Fail

Quality criterion - Name: Delivery Methodology / Weighting: 45%

Quality criterion - Name: Management Methodology / Weighting: 12.5%

Quality criterion - Name: Management & Delivery Team - Core Team / Weighting: 10%

Quality criterion - Name: Management & Delivery Team - Additional Resources / Weighting: 2.5%

Price - Weighting: 30%

## **II.2.6) Estimated value**

Value excluding VAT: £3,200,000

## **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

It is expected that these services will be required from September 2022 and will be awarded for an initial period of 3 years, with HIE having the option to extend for a period or periods together not exceeding 1 year following the Initial Term.

## **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

Description of options

HIE reserves the right, on giving reasonable written notice from time to time, to require changes to the Services (whether by way of the removal of Services, the addition of new Services, or increasing or decreasing the Services or specifying the order in which the Services are to be performed or the locations where the Services are to be provided). HIE shall not require any such change other than where it is permitted by Regulation 72 of the Public Contracts (Scotland) Regulations 2015.

In accordance with Regulation 72(1)(a) of the Public Contracts (Scotland) Regulations 2015, HIE reserves the right to make changes to the volume, scope or location of the Services to be supplied under the Framework following a review of the Services by HIE, particularly with regard to demand and budgetary availability or where HIE's strategic focus changes as a result of changes in Scottish Government policy or as a result of a direction given by the

Scottish Government.

Where HIE determines (at our sole discretion) that demand under one or more Lots is lower than expected, HIE reserves the right to re-allocate the budget for that Lot to one or more of the other Lots, subject to the maximum total budget of GBP 3 560 000.

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015.

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.2) Economic and financial standing**

Minimum level(s) of standards possibly required

Minimum level(s) of standards required:

4B.5 It is a requirement of this Framework that bidders hold, or can commit to obtain prior to the commencement of any subsequently awarded Framework, the types and levels of insurance indicated below:

Professional Risk Indemnity Insurance = GBP 1M for each and every claim

Employer's (Compulsory) Liability Insurance = GBP 5M for each and every claim - see <http://www.hse.gov.uk/pubns/hse40.pdf> for more information

Public Liability Insurance = GBP 1M for each and every claim

4B.6 (not scored)

HIE as a public body must comply with HMRC IR35 provisions. Therefore, where you are bidding as a personal service company (PSC) or will be using a personal service company to



provide services under the Framework please identify these PSC (s) in your response to 4B.6.

### **III.1.3) Technical and professional ability**

Minimum level(s) of standards possibly required

Bidders will be required to confirm whether they intend to subcontract and, if so, for what proportion of the contract.

## **III.2) Conditions related to the contract**

### **III.2.2) Contract performance conditions**

The Framework will include Key Performance Indicators (KPI's) which can be found within the Tender documentation.

### **III.2.3) Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 7

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: Yes

## **IV.2) Administrative information**

### **IV.2.1) Previous publication concerning this procedure**

Notice number: [2021/S 000-031780](#)

### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

6 May 2022

Local time

12:00pm

### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 6 (from the date stated for receipt of tender)

### **IV.2.7) Conditions for opening of tenders**

Date

6 May 2022

Local time

12:00pm

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: HIE reserves the right to re-tender for

these services upon termination of the contract or at the end of the contract period, including any extension period.

## **VI.2) Information about electronic workflows**

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

## **VI.3) Additional information**

A webinar to support this tender is being held on 31st March - registration details are at <https://www.sdpScotland.co.uk/events/talking-tenders-with-highlands-and-islands-enterprise-and-south-of-scotland-enterprise-1312/>.

It is estimated that the total value of the services over the maximum duration of 4 years will be GBP 3 200 000 (excluding VAT). This figure has been used in II.1.5 & II.2.6.

Where bidders are participating with others (SPD 2A.17) and/or relying on the capacity of other entities in order to meet selection criteria (SPD 2C.1) they are required to provide information relating to these entities with the relevant supporting SPD documentation being submitted.

SPD 2A.3 (not scored) Where relevant, bidders are required to insert details of their Companies House (or equivalent) registration number

SPD 2C.1 & 2D.1 Where relevant, bidders are required to provide information relating to consortia and/or sub-contractors with the relevant supporting SPD documentation being submitted.

SPD 3D.12 Bidders should refer to the "Conflict of Interest" Section within the Scope of Requirements when completing this question.

SPD 4B6 HIE as a public body must comply with HMRC IR35 provisions. Therefore, where you are bidding as a personal service company (PSC) or will be using a personal service company to provide services under the Framework please identify these PSC(s) in your response to 4B.6. Further guidance and a link to the HMRC "test employment details for tax" tool can be located at

<https://www.gov.uk/guidance/check-employment-status-for-tax>

AWARD CRITERIA SCORING – Due to system restrictions in terms of characters permitted for this Section, full details of the scoring methodologies are contained within the Scope of Requirements.

The maximum weighted scores available for Quality is 70% - we have set a minimum threshold of 40% for bidders to achieve in order to remain in the process. Bidders who do not achieve this minimum threshold will not be evaluated further and will be excluded from the evaluation process.

In order to participate, bidders should register, for free, on the Public Contracts Scotland (PCS) website ([www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)) and record their interest in this contract and download and complete all relevant documentation.

Tenders must be submitted via the PCS postbox and must be received by the published deadline. Late tenders will not be accepted and HIE

will reject any submissions received after the deadline. Email or hard copy responses will not be accepted.

PCS also gives suppliers access to an on-line Question & Answer facility which allows queries to be submitted (anonymously), and answers published and shared with all potential bidders.

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at [https://www.publiccontractsscotland.gov.uk/Search/Search\\_Switch.aspx?ID=687398](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=687398).

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at [https://www.publiccontractsscotland.gov.uk/sitehelp/help\\_guides.aspx](https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx).

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

Community benefits are included in this requirement. For more information see: <https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

Community Benefits will not be evaluated as part of the tender process but bidders are expected to provide a Community Benefit proposal as part of their tender detailing how, if awarded the contract, these will be addressed. Please refer to the Scope of Requirements for further details.

(SC Ref:687398)

Download the ESPD document here:

[[[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=687398](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=687398)]]

## **VI.4) Procedures for review**

### **VI.4.1) Review body**

Inverness Sheriff Court and Justice of the Peace Court

The Inverness Justice Centre, Longman Road

Inverness

IV1 1AH

Email

[inverness@scotcourts.gov.uk](mailto:inverness@scotcourts.gov.uk)

Telephone

+44 1463230782

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/inverness-sheriff-court-and-justice-of-the-peace-court>

### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

An economic operator that suffers, or is at risk of suffering, loss or damage attributable to a breach of duty under the Public Contracts (Scotland) Regulations 2015 or the Procurement Reform (Scotland) Act 2014 , may bring proceedings in the Sheriff Court or the Court of Session.