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Tender

## **Expert Help Management Consultancy**

South of Scotland Enterprise Agency

F02: Contract notice

Notice identifier: 2021/S 000-010288

Procurement identifier (OCID): ocds-h6vhtk-02afa1

Published 11 May 2021, 3:04pm

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

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

South of Scotland Enterprise Agency

Carmont House, The Crichton, Bankend Road

Dumfries

DG1 4TA

#### **Contact**

Kirsty McVeigh

#### **Email**

[kirsty.mcveigh@sose.scot](mailto:kirsty.mcveigh@sose.scot)

#### **Telephone**

+44 1750535842

#### **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.3) Communication**

Access to the procurement documents is restricted. Further information can be obtained 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)

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

[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**

Expert Help Management Consultancy

Reference number

SOSE026

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

- 66171000 - Financial consultancy services

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

Services

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

The South of Scotland Enterprise Agency (SOSE) are undertaking a tender process to identify and appoint a ranked framework contract of Service Provider(s) covering all aspects of Operations-specific consultancy requirements for SME's within the South of Scotland (Scottish Borders and Dumfries and Galloway) area. This contract will be divided into Lots as follows:

Lot 1 - Strategy/Marketing & Communications

Lot 2 - HR & Workforce Development

Lot 3 - Innovation & Business Improvement

Lot 4 - ICT/Digital

Lot 5 - Low Carbon/Net Zero

Lot 6 - International Trade

Suppliers can bid for one, all or a mixture of the Lots.

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

Value excluding VAT: £680,000

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

### **II.2) Description**

#### **II.2.1) Title**

Strategy/Marketing & Communications

Lot No

1

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

- 79342000 - Marketing services
- 79340000 - Advertising and marketing services

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

- Strategic Review: Includes high level business planning, strategic reviews, 1-2-1 engagement with leadership teams, post covid recovery planning
- Financial review: 1-2-1 engagement, Includes models, systems and reporting, strategic reviews of complex opportunities and taxation
- Access to finance: 1-2-1 Includes shaping prospectus for approach to funders. Complementing investor readiness and the SIB resource as appropriate
- Sales and marketing: Includes market assessment, domestic and international marketing

Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

### **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

Option to extend for a further 12-month period

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

Variants will be accepted: No

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

Options: No

### **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) Description**

### **II.2.1) Title**

HR & Workforce Development

Lot No

2

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

- 79414000 - Human resources management consultancy services

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

-Human Resources: Includes employment and employee development

- HR policy, planning and practice: Review employee engagement, wellbeing, Skills analysis and succession planning

- Workplace culture Review: Help leadership teams to develop longer term workforce plans. Guidance on developing company structure

Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Option to extend for a further 12-month period

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

Variants will be accepted: No

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

Options: No

#### **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) Description**

#### **II.2.1) Title**

Innovation & Business Improvement

Lot No

3

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

- 73000000 - Research and development services and related consultancy services
- 71317210 - Health and safety consultancy services

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

- New product development: Intensive sessions with business owners and leaderships team
- Process review: Includes areas of business improvement, operational, health & safety
- Research & Development: Includes helping prepare for R&D
- Governance: Includes board development, legal structure, new delivery/business models, collaboration
- Intellectual Property: Includes Trademarks, Copyright, Registered Design and Patent advice
- Change Management: Working directly with organisations to assist through a period of change, this be ownership, manufacturing methods or major staffing changes for example

#### Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Option to extend for a further 12-month period



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

Variants will be accepted: No

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

Options: No

### **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) Description**

### **II.2.1) Title**

ICT/Digital

Lot No

4

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

- 72223000 - Information technology requirements review services
- 72222000 - Information systems or technology strategic review and planning services

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

- Digital Boost Delivery: Digital Boost will give direct assistance businesses in South of Scotland Region with up to 21 hours of 1-2-1 support and consultancy to raise their skills and knowledge levels, so they adopt and optimise the use of digital technology.
- Strategic Review: To complement and add value to the Digital Boost Delivery - Includes high level business planning and 1-2-1 engagement with leadership teams

Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

#### **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

Option to extend for a further 12-month period

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

Variants will be accepted: No

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

Options: No

#### **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) Description**

#### **II.2.1) Title**

Low Carbon/Net Zero

Lot No

5

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

- 90700000 - Environmental services
- 80540000 - Environmental training services

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

- Environmental Impact Reports: Includes high level environmental Impact diagnostics
- Environmental Reviews: Reviewing operations, benchmarking, and action plans

Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Option to extend for a further 12-month period

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

Variants will be accepted: No

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

Options: No

#### **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) Description**

#### **II.2.1) Title**

International Trade

Lot No

6

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

- 79000000 - Business services: law, marketing, consulting, recruitment, printing and security

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

NUTS codes

- UKM9 - Southern Scotland

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

1-2-1 Engagement:

- New Market Development: Strategic Intensive sessions with business owners and

leaderships team

- Strategic Review: Includes high level business planning and 1-2-1 engagement with leadership teams
- Access to finance: Includes shaping prospectus for approach to funders. Complementing investor readiness and the SIB resource as appropriate
- Sales and marketing: Includes market assessment, domestic and international marketing

Expert Help Surgeries:

- Surgeries offering business 1.5 hour of expert help on strategy/Communications and Marketing

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

Quality criterion - Name: Conflict of Interest / Weighting: Pass/Fail

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Option to extend for a further 12-month period

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

Variants will be accepted: No

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

Options: No

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

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

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

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

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

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

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## **Section IV. Procedure**

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

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

Open procedure

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

Date

15 June 2021

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**

Tender must be valid until: 8 December 2021

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

Date

15 June 2021

Local time

12:00pm

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## **Section VI. Complementary information**

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

This is a recurrent procurement: No

### **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**

In order to participate, bidders should register, for free, on the 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. SOSE will reject any submissions received after the deadline. Email or hard copy responses will not be accepted.

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

This Framework will be non-exclusive i.e. SOSE reserves the right, in certain circumstances, to procure out with the Framework as and when required.

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. A summary of the expected community benefits is included in the Invitation to Tender.

Fair Work and Sustainability practices will be reviewed as part of this tender process.

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=652509](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=652509).

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:  
<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2361>

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

- Graduate, Apprentice, work placements and/or trainee placements
- Supplier engagement with schools, colleges and/or universities
- Holding educational and raising awareness events for the community
- Professional advice, mentoring and support provided to the community
- Providing funding for new community facilities
- Support and development opportunities delivered to young people
- Opening up sub-contracting opportunities to SME's and third sector organisations
- Monetary value of contributions to community activities

(SC Ref:652509)

Download the ESPD document here:  
[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=652509](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=652509)

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

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

Dumfries Sheriff Court

Buccleuch Street

Dumfries

DG1 2AN

Telephone

+44 1387262334

Country

United Kingdom

**VI.4.2) Body responsible for mediation procedures**

Scottish Government Single Point of Enquiry

Procurement and Commercial Division, 7th Floor, 5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

[SPOEprocurement@scotland.gsi.gov.uk](mailto:SPOEprocurement@scotland.gsi.gov.uk)

Telephone

+44 1412425466

Country

United Kingdom

Internet address

[www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries](http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries)