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Tender

## **Financial administration and management of Scottish Government heat and energy efficiency grant and loan schemes**

Scottish Government

F02: Contract notice

Notice identifier: 2023/S 000-012254

Procurement identifier (OCID): ocds-h6vhtk-03bdce

Published 28 April 2023, 11:02am

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

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

Scottish Government

4 Atlantic Quay, 70 York St

Glasgow

G2 8EA

#### **Contact**

Gary Crombie

#### **Email**

[Gary.crombie@gov.scot](mailto:Gary.crombie@gov.scot)

#### **Telephone**

+44 7392287522

**Country**

United Kingdom

**NUTS code**

UKM - Scotland

**Internet address(es)**

Main address

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

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA10482](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA10482)

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

The contract is awarded by a central purchasing body

**I.3) Communication**

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

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

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

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

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

Ministry or any other national or federal authority

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

General public services

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## **Section II: Object**

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

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

Financial administration and management of Scottish Government heat and energy efficiency grant and loan schemes

Reference number

Case Ref 593743

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

- 71314300 - Energy-efficiency consultancy services

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

Services

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

The Scottish Government is seeking a service provider to undertake the financial administration and management of a number of its heat and energy efficiency loan and grant schemes

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

Value excluding VAT: £61,500,000

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

This contract is divided into lots: No

## **II.2) Description**

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

- 66172000 - Financial transaction processing and clearing-house services
- 66190000 - Loan brokerage services
- 79940000 - Collection agency services

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

NUTS codes

- UKM - Scotland

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

The Scottish Government is seeking a suitably qualified and experienced Service Provider to undertake the financial administration and management of a number of the Purchaser's loan and grant schemes, as described herein.

The required services include the processing of, and decision-making on, applications for those loan and grant schemes that are open during the course of the contract. It also includes the associated administration of loan and grant payments and repayments, including the repayment of outstanding loans from loan schemes which are either closed at contract start date or which close to new applications during the course of the contract.

The Contract has a maximum value of 61.5 million GBP if all extension options are taken up. It should be noted, however, that contract value is a function of demand, and that total demand cannot be accurately forecast

The purchaser is unable to provide any guarantee relating to application volumes but expects application volumes in year 1 of the contract across all live schemes to potentially range between 10,000 – 15,000, whilst applications in a potential year 5 of the contract have the potential to exceed 25,000.

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

Quality criterion - Name: Service Delivery / Weighting: 35

Quality criterion - Name: Management Staffing and Resourcing / Weighting: 10

Quality criterion - Name: Service Management / Weighting: 30

Quality criterion - Name: Climate Change / Weighting: 5

Quality criterion - Name: Community Benefits / Weighting: 5

Quality criterion - Name: Fairwork First / Weighting: 5

Quality criterion - Name: Business Continuity and Disaster Recovery / Weighting: 5

Quality criterion - Name: Cyber Security / Weighting: 5

Price - Weighting: 30

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

Value excluding VAT: £61,500,000

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

Start date

1 December 2023

End date

30 November 2026

This contract is subject to renewal

Yes

Description of renewals

This contract can be extended for a further 24 month optional extensions to be taken up at Scottish Ministers discretion

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

Variants will be accepted: No

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

Options: Yes

Description of options

This contract can be extended for a further 24 months optional extensions to be taken up at Scottish Ministers discretion

### **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**

Cyber Security will be scored on a 0-4 basis Tenderers must score a minimum moderated average of 2 to be taken forward to price quality ratio.

Tenderers must be Financial Authority Conduct registered at the time of contract award

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

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

#### **III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

Tenderers must be registered by the Financial Conduct Authority at the time of contract award.

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

Minimum level(s) of standards possibly required

Minimum level(s) of standards required:

#### SPD 4B.4

Bidders must demonstrate a Current Ratio of no less than 1.0.

Current Ratio will be calculated as follows:

net current assets divided by net current liabilities.

There must be no qualification or contra-indication from any evidence provided in support of the bidders economic and financial standing.

#### SPD Statement for 4B.5

It is a requirement of this contract that bidders hold or can commit to obtain prior to the commencement of any

contract, the insurances indicated below:

Employer's (Compulsory) Liability Insurance = 5 million GBP

Public Liability Insurance = 1 million GBP

Professional Indemnity Insurance = 5 million GBP

Cyber Insurance = 1 million GBP

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

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

It shall be a condition of the Contract that, if required by the Scottish Government, the appointed Service Provider shall deliver a validly

executed Parent Company Guarantee in the form set out in the tender documents.

#### **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.1.8) 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: [2023/S 000-010369](#)

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

Date

13 June 2023

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

13 June 2023

Local time

1:00pm

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## **Section VI. Complementary information**

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

This is a recurrent procurement: No

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

SPD will be scored on a pass/fail basis.

The contract award criteria will be Price 30%/Quality 70 %.

Question Scoring Methodology for Award Criteria outlined in invitation to tender:

0 — Unacceptable. Nil or inadequate response. Fails to demonstrate an ability to meet the requirement.

1 — Poor. Response is partially relevant but generally poor. The response addresses some elements of the

requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be

fulfilled.

2 — Acceptable. Response is relevant and acceptable. The response addresses a broad understanding of the

requirement but may lack details on how the requirement will be fulfilled in certain areas.

3 — Good. Response is relevant and good. The response is sufficiently detailed to demonstrate a good

understanding and provides details on how the requirements will be fulfilled.

4 — Excellent. Response is completely relevant and excellent overall.

Bidders must complete the SPD (Scotland) to demonstrate adherence to the Exclusion and

## Selection Criteria

for this procurement.

If there are named subcontractors/technicians upon which the bidder will rely to meet the selection criteria, these named parties must

complete and reattach the SPD Supplier Response Form attached to SPD

questions 2C.1.1 (Technicians) and 2D.1.2 (Subcontractors) on PCS-T. These parties must complete the first three sections of the SPD

form, as well as any part of the section 4 selection criteria that the main bidder will rely upon the parties to fulfil. If parties have not yet

been identified, this information may be required at a later

date. Scottish Government reserves the right to request this information from relevant parties upon whom the

main bidder will not rely to fulfil selection criteria.

4C.10 Bidders will be required to confirm whether they intend to sub-contract and if so, for what proportion of the

contract.

The buyer is using PCS-Tender to conduct this ITT exercise. The Project code is 22685. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

A sub-contract clause has been included in this contract. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2363>

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 be a scored Evaluation Criteria

SGPT Community Benefits Guidance - June 2021

The tenderer must provide a Community Benefits proposal that is relevant to the subject matter of this contract and supports the Scottish

Ministers' commitment to contributing to the social, economic & environmental well-being of the people of Scotland, as described in the

specification.

Tenderers should not provide details of any existing initiatives they already undertake as part of their day-to-day business and the

community benefits proposed must be generated specifically for and as a result of this contract.

Good answers will demonstrate to evaluators that the tenderer has a comprehensive understanding of the subject matter of this contract and

how the proposed benefits will reflect the national outcomes described in the Specification.

Proposals can be innovative but must be tangible and measurable, so that they can be monitored and reported throughout the contract.

(SC Ref:716757)

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

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

Sherrif House

27 Chamber Street

Edinburgh

Country

United Kingdom