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Tender

## **ITT for a Comprehensive AI Knowledge Assistant Solution**

Energy Saving Trust Ltd

F02: Contract notice

Notice identifier: 2024/S 000-024802

Procurement identifier (OCID): ocds-h6vhtk-04885a

Published 7 August 2024, 10:40am

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

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

Energy Saving Trust Ltd

Prospect House, 5 Thistle Street

EH2 1DF

Edinburgh

#### **Email**

[maddalena.galloni@est.org.uk](mailto:maddalena.galloni@est.org.uk)

#### **Telephone**

+44 1315557900

#### **Country**

United Kingdom

## **NUTS code**

UKM75 - Edinburgh, City of

## **Internet address(es)**

Main address

[www.energysavingtrust.org.uk](http://www.energysavingtrust.org.uk)

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA14923](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA14923)

## **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

[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**

Other type

Not for Profit

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

General public services

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## **Section II: Object**

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

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

ITT for a Comprehensive AI Knowledge Assistant Solution

Reference number

EST/ITT/AIK/0824

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

- 48000000 - Software package and information systems

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

Supplies

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

Energy Saving Trust is seeking to appoint a supplier to provide an AI supported federated enterprise search capability, in short, an AI Knowledge assistant for all of Energy Saving Trust's digital assets. This includes but may not be limited to our website portfolio, Microsoft SharePoint and Office, CRM systems, Intranet, inhouse applications and selected Shared Drives. The content source landscape is dynamic and will change over time. Internally it needs to be available to all employees and in part to contracted advice staff and function as an effective answer engine. Integration into our websites for customer service purposes needs to be included. The application hosting will ideally be on the Energy Saving Trust's Azure tenant and the cost needs to be included in the bid.

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

Value excluding VAT: £260,000

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

This contract is divided into lots: No

## **II.2) Description**

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

- 48000000 - Software package and information systems

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

NUTS codes

- UK - United Kingdom

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

Energy Saving Trust is seeking an AI-supported federated enterprise search capability, here called AI Knowledge Assistant, to enhance the accessibility and usability of Energy Saving Trust's digital assets.

The solution must integrate seamlessly with various platforms, including website CMS like WordPress, Microsoft SharePoint, Office, CRM systems (MS Dynamics, Salesforce), the Intranet, in-house applications, and selected shared drives. It must offer extensive data source connectivity and data enrichment through AI and machine learning.

By connecting all employees (app. 500) and contractors (120-200) to relevant knowledge, the AI Knowledge Assistant will save time, improve efficient onboarding, facilitate the discovery of knowledge sources, and help close knowledge gaps.

Leveraging advanced natural language processing (NLP), the system must understand and process complex queries in multiple languages, ensuring high search relevance and accuracy.

Customization and flexibility are essential, with options for adaptable workflows, customizable data fields, and user permissions to meet specific business needs.

Security and compliance are paramount, requiring robust encryption, role-based access controls and adherence to regulatory standards like GDPR, HIPAA, EU AI Act.

The solution must offer a user-friendly interface with intuitive navigation, customizable dashboards, and support for various user roles and the ability to be integrated in the flow of work, i.e. MS Teams

High performance, scalability, and efficient data processing capabilities are crucial, ensuring the system can handle increasing data volumes and user bases without degradation.

Comprehensive customer support, transparent pricing, and flexible deployment options are also required, including hosting on Energy Saving Trust's Azure cloud tenant. The latter needs to be included in the pricing.

The AI Knowledge Assistant should provide advanced data visualization, robust analytics capabilities, and support for all standard content formats, including search in audio and video.

The supplier should demonstrate commercial sustainability, strategic partnerships, and high user satisfaction ratings, supported by positive reviews and testimonials.

Accessibility features must comply with standards like WCAG and Section 508 for US organisations, ensuring usability for individuals with disabilities.

Externally, the AI Knowledge Assistant must be able to enhance customer service by integrating with the website as an AI-powered chatbot, providing instant and accurate responses to queries. This tool should help Energy Saving Trust engage effectively with individuals, businesses, communities, and governments, promoting energy efficiency, conservation, and sustainable energy use.

Engagement channels include online resources, tools, websites, phone helplines, email, local events, workshops, partnerships, grants, social media, and newsletters. The AI Knowledge Assistant will support advisors in these engagement efforts by providing comprehensive, accessible, and efficient access to information across all digital assets, ultimately contributing to energy savings and reduced carbon emissions.

Extra requirements of the contract are WordPress plugin development for integration with most of our websites and integrations with a customised Microsoft Dynamics installation and our in-house application eco-system.

The commencement date of the project is the 14th of October 2024. The maximum budget including estimated hosting costs is GBP260k (GBP65k per year for a period of 4 years) with annual renewal.

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

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Value excluding VAT: £260,000

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

Duration in months

12

This contract is subject to renewal

Yes

Description of renewals

As described in the ITT.

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

List and brief description of conditions

As described in the ITT.

#### **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

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

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

As described in the ITT.

#### **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: No

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

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

Date

6 September 2024

Local time

12:00pm

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

English

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

Date

6 September 2024

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 invoicing will be accepted

Electronic payment will be used

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

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/>.

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.

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=774414](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=774414).

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(SC Ref:774414)

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

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

Edinburgh Sheriff Court and Justice of the Peace Court

Saughton House, Broomhouse Drive

Edinburgh

EH11 3XD

Country

United Kingdom