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Tender

## **Asset Management Technical Services Framework**

Transport Scotland

F02: Contract notice

Notice identifier: 2023/S 000-029839

Procurement identifier (OCID): ocds-h6vhtk-040ab7

Published 10 October 2023, 2:47pm

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

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

Transport Scotland

2nd Floor, George House, 36 North Hanover Street

Glasgow

G1 2AD

#### **Email**

[stephen.breslin@transport.gov.scot](mailto:stephen.breslin@transport.gov.scot)

#### **Telephone**

+44 1412727100

#### **Country**

United Kingdom

#### **NUTS code**

UKM82 - Glasgow City

**Internet address(es)**

Main address

<http://www.transport.gov.scot>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00099](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00099)

**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

<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

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

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

National or federal Agency/Office

**I.5) Main activity**

Other activity

Transport

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## **Section II: Object**

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

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

Asset Management Technical Services Framework

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

- 71311000 - Civil engineering consultancy services

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

Services

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

Transport Scotland, on behalf of the Scottish Ministers, has identified the need to establish a Multiple Supplier Framework Agreement. This Multiple Framework Agreement for Asset Management Technical Services covers services crucial to allowing Transport Scotland to meet statutory, legal and contractual obligations and aimed at driving continuous improvement in how we manage and analyse Scottish Trunk Road asset data. The services consider national standards and codes of practice, maintenance processes/procedures, asset performance and budget assignment to deliver value for money and innovation.

The Framework will consist of four Lots covering:

- 1) Asset Management Improvement Programme (AMIP) Lot which will include lifecycle planning; network resilience; scheme identification, prioritisation and optimisation; updates to road asset management policy, strategy and planning; information management; performance management as well as staff support and training.
- 2) Asset Management Performance System (AMPS) Development and Maintenance Lot. AMPS is an existing IT management and service delivery tool that is essential to the effective management and maintenance of the Scottish trunk road network and the delivery of the Operating Company Contracts. The service will through its lifetime require development and maintenance in order to improve functionality aimed at driving future improvements in Transport Scotland's asset management practices through improved analytical capabilities and fully integrated management tools that deliver value for money solutions.
- 3) Geotechnical Certification Services Lot. The principal services shall comprise the

provision of an independent geotechnical services for the certification of ground investigations, geotechnical design and other geotechnical activities related to the Scottish Trunk Road network. This shall include both the performance of the service and the provision of advice in relation to the service. In addition the services shall comprise providing advice in relation to technical specifications or publications. Other geotechnical-related services may be required to be undertaken from time to time, including similar services related to railway and other transport infrastructure.

4) Asset Management Technical Advice Lot. This will cover Design Standards and Professional Services which covers the review and provision of advice in relation to Departures from Standards including the Design Manual for Roads and Bridges (DMRB), Manual of Contract Documents for Highway Works (MCHW), and all other Transport Scotland and UK wide Design Guidance and Technical Documents (or an equivalent to each of these documents). In addition this Lot will cover Transport Research to enable research and development work to deliver improvements in safety, construction, operation, and maintenance of the Scottish road network.

The proposed framework will be in place for a period of 4 years.

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

Value excluding VAT: £13,400,000

#### **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**

Asset Management Improvement Programme

Lot No

1

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

- 71311000 - Civil engineering consultancy services
- 71311210 - Highways consultancy services

- 71311300 - Infrastructure works consultancy services
- 79420000 - Management-related services
- 79411000 - General management consultancy services
- 79311410 - Economic impact assessment

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

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

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

The scope of services for Lot 1 will aim to deliver:

Enhanced asset management practices to support the optimal allocation of maintenance budgets and generate efficiencies.

Support the delivery of net zero initiatives being implemented across the Directorate. Research into low carbon solutions for maintenance and renewals, and develop tools and asset strategies to consider carbon in the whole life decision making process.

Consideration of maintenance practices and identifying opportunities for improvements to be made to specifications, contracts, and internal procedures. Respond to climate change through a network that is resilient to more frequent and extreme weather events, including flooding.

Continue to review and update the format and content of the Asset Management Policy, Strategy and Plan to ensure a holistic and transparent approach in managing and maintaining all trunk road assets as defined in the Scottish Government Infrastructure Investment Plan. Align with the principles of ISO 55000.

Extend the project level pavement lifecycle planning and costing model for comparison of alternatives across various trunk road elements.

Continued review of the requirements for data collection and storage, clearly demonstrating how it is being used to support business decisions.

Continued development of models and tools to produce long-term financial and

maintenance plans in support of Scottish Government Spending Review submissions and State of the Asset reports.

The Framework Contractor will be procured through a competitive tender procedure, in accordance with the restricted procedure as stated in the Public Contracts (Scotland) Regulations 2015. This is a two stage procedure, comprising a prequalification stage and a tender stage. Section II.2.9 of this Contract Notice describes the criteria for choosing the limited number of candidates. In order to be considered for the prequalification stage, economic operators are required to complete and submit a SPD, which can be downloaded via the Public Contracts Scotland site.

The Award Procedures for placing a Call-off Contract under this Lot shall be detailed within the ITT documentation.

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

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Duration in months

48

This contract is subject to renewal

No

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged number of candidates: 5

Objective criteria for choosing the limited number of candidates:

Objective criteria for choosing the limited number of candidates:

It is intended that five economic operators be taken forward to tender participation stage. These economic operators shall be those who have:

- (i) submitted a compliant submission, comprising the completed SPD
- (ii) satisfied the relevant selection criteria under the exclusion grounds
- (iii) (a) Minimum Standards of Eligibility - provided evidence to satisfy the eligibility criteria; and
- (b) Technical or Professional Ability - provided evidence demonstrating an acceptable level of technical or professional activity; and
- (c) Educational & Professional Qualifications - possess the necessary educational and professional qualifications to perform the requirement
- (iv) has in place quality, environmental and health and safety management systems;
- (v) satisfied minimum standards of economic and financial standing
- (vi) achieved the first, second, third, fourth and fifth highest combined weighted scores in respect of technical or professional ability calculated in accordance with the responses to Statements (b),(c),(d), (e) and (f) (refer to Section III.1.3).

However, if an economic operator has not submitted a compliant submission as described in (i) above, failed in respect of either (ii), (iii), (iv) or (v) above, then that economic operator shall be excluded from the ranking of scores described in (vi) as above.

In terms of Public Contracts (Scotland) Regulations 2015, there will be a requirement on economic operators to provide proof of economic and financial standing, and of technical and professional ability prior to proceeding to the next stage of competition and award. The tender documents will contain specific provisions requiring tenders to inform Transport Scotland of any changes to their economic and financial standing or technical and professional ability during the procurement competition.

Transport Scotland reserves the right to undertake further verification to ensure continuing compliance with the selection criteria at any time prior to proceeding to the next stage of the competition and contract award, including during any standstill period. If means of proof does not satisfy Transport Scotland's selection criteria and/or if an economic operator no longer meets the requirements set out in the tender documents, it shall be excluded from this procurement competition. If this follows tender evaluation, including during any standstill period, the next ranked most economically advantageous tenderer shall be requested to provide proof of economic and financial standing, and technical and professional ability with a view to executing an Agreement.

#### **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.2.14) 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.

## **II.2) Description**

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

Asset Management Performance System (AMPS) Development and Maintenance



Lot No

2

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

- 71311210 - Highways consultancy services
- 71311200 - Transport systems consultancy services
- 71311000 - Civil engineering consultancy services
- 79313000 - Performance review services

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

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

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

The scope of services for Lot 2 will aim to deliver:

Access to a range of Information & Communications Technology (ICT) specialists, such as System Developers and Testers to provide technical expertise in the continual development and maintenance of AMPS software, including data management products and other utility software. Ensure the continued availability of AMPS, a Transport Scotland contractual requirement for the Operating Company Contracts.

Ensure the security of the system that is used to store commercially sensitive contractual rates, and to approve, hold and monitor all OC spend, ensuring scrutiny and transparency in OC spend, protecting Ministers from financial risk.

The system is used to record and monitor the repair of safety critical defects - loss of service would result in a breach of Scottish Ministers' statutory responsibilities. The system is used to store and analyse accident data and skidding resistance data - loss of service would result in a breach of Scottish Ministers' statutory responsibilities.

Access to specialist technical System Support to provide a managed service that can identify and explore opportunities for continual service improvement, determining costs and benefits of new approaches and managing change or assisting implementation where

needed.

Access to specialist Business Analysis support to identify improvements in business processes that derive efficiencies in system operations, ensuring that the organisation drives maximum value from its services and delivers a transparent and auditable system that can monitor Operating Company spend and compliance.

Access to Decision Support Tool Specialists to provide advice on the implementation of a number of important decision support tools in AMPS, such as Abnormal Load Routing, Whole Life Cost Modelling, Whole Life Carbon Modelling' Bridge Condition Index (BCI) Calculations, Deflectograph analysis, Accident Cluster Analysis etc.

Access to Data Scientists to continually develop and improve AMPS data analytical capabilities through the use of a range of statistical tools and techniques such as predictive analysis and modelling that transforms data into organisational insight.

Develop modelling capability aligned with climate change policy and Net Zero targets.

Provision of specialist technical support essential to management of risk to the Scottish Ministers arising from failure to comply with statutory obligations and contractual duties.

Provision of specialist technical support essential to the delivery of transparency, accountability and assurance as required by the Scottish Ministers.

The Framework Contractor will be procured through a competitive tender procedure, in accordance with the restricted procedure as stated in the Public Contracts (Scotland) Regulations 2015. This is a two stage procedure, comprising a prequalification stage and a tender stage. Section II.2.9 of this Contract Notice describes the criteria for choosing the limited number of candidates. In order to be considered for the prequalification stage, economic operators are required to complete and submit a SPD, which can be downloaded via the Public Contracts Scotland site.

The Award Procedures for placing a Call-off Contract under this Lot shall be detailed within the ITT documentation.

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

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Duration in months

48

This contract is subject to renewal

No

**II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged number of candidates: 5

Objective criteria for choosing the limited number of candidates:

Objective criteria for choosing the limited number of candidates:

It is intended that five economic operators be taken forward to tender participation stage.

These economic operators shall be those who have:

- (i) submitted a compliant submission, comprising the completed SPD
- (ii) satisfied the relevant selection criteria under the exclusion grounds
- (iii) (a) Minimum Standards of Eligibility - provided evidence to satisfy the eligibility criteria; and  
(b) Technical or Professional Ability - provided evidence demonstrating an acceptable level of technical or professional activity; and  
(c) Educational & Professional Qualifications - possess the necessary educational and professional qualifications to perform the requirement
- (iv) has in place quality, environmental and health and safety management systems;
- (v) satisfied minimum standards of economic and financial standing
- (vi) achieved the first, second, third, fourth and fifth highest combined weighted scores in respect of technical or professional ability calculated in accordance with the responses to Statements (b),(c),(d) and (e) (refer to Section III.1.3).

However, if an economic operator has not submitted a compliant submission as described in (i) above, failed in respect of either (ii), (iii), (iv) or (v) above, then that economic operator shall be excluded from the ranking of scores described in (vi) as above.

In terms of Public Contracts (Scotland) Regulations 2015, there will be a requirement on economic operators to provide proof of economic and financial standing, and of technical and professional ability prior to proceeding to the next stage of competition and award. The tender documents will contain specific provisions requiring tenders to inform Transport Scotland of any changes to their economic and financial standing or technical and professional ability during the procurement competition.

Transport Scotland reserves the right to undertake further verification to ensure continuing compliance with the selection criteria at any time prior to proceeding to the next stage of the competition and contract award, including during any standstill period. If means of proof does not satisfy Transport Scotland's selection criteria and/or if an economic operator no longer meets the requirements set out in the tender documents, it shall be excluded from this procurement competition. If this follows tender evaluation, including during any standstill period, the next ranked most economically advantageous tenderer shall be requested to provide proof of economic and financial standing, and technical and professional ability with a view to executing an Agreement.

### **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.2.14) 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.

## **II.2) Description**

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

Geotechnical Design Certification Services

Lot No

3

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

- 71351500 - Ground investigation services
- 71332000 - Geotechnical engineering services
- 79132000 - Certification services

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

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

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

The scope of the services for Lot 3 will aim to:

Mitigate the risk to Scottish Ministers posed by the management of geo-hazards and the implementation of ground engineering solutions.

Deliver compliance with legal duties to comply with national design standards and Construction Design and Management Regulations.

Deliver Scottish Ministers' contractual obligations with respect to published national design standards in the Design Manual for Roads and Bridges, British Standards and Eurocodes for design of ground engineering solutions.

Contribute to the delivery of Net Zero objectives within ground engineering.

Contribute to the delivery of adaptation to the trunk road asset in mitigating the impacts of the climate emergency.

Contribute to the continual review and revision of national Design Standards to ensure the interests of Scottish Ministers are represented at UK national level

Mitigate the risks to Scottish Ministers from third party works on, or adjacent to, the trunk road network and the implications thereof.

The Framework Contractor will be procured through a competitive tender procedure, in accordance with the restricted procedure as stated in the Public Contracts (Scotland) Regulations 2015. This is a two stage procedure, comprising a prequalification stage and a tender stage. Section II.2.9 of this Contract Notice describes the criteria for choosing the limited number of candidates. In order to be considered for the prequalification stage, economic operators are required to complete and submit a SPD, which can be downloaded via the Public Contracts Scotland site.

The Award Procedures for placing a Call-off Contract under this Lot shall be detailed within the ITT documentation.

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

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Duration in months

48

This contract is subject to renewal

No

**II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged number of candidates: 5

Objective criteria for choosing the limited number of candidates:

Objective criteria for choosing the limited number of candidates:

It is intended that five economic operators be taken forward to tender participation stage.

These economic operators shall be those who have:

- (i) submitted a compliant submission, comprising the completed SPD
- (ii) satisfied the relevant selection criteria under the exclusion grounds
- (iii) (a) Minimum Standards of Eligibility - provided evidence to satisfy the eligibility criteria; and  
(b) Technical or Professional Ability - provided evidence demonstrating an acceptable level of technical or professional activity; and  
(c) Educational & Professional Qualifications - possess the necessary educational and professional qualifications to perform the requirement
- (iv) has in place quality, environmental and health and safety management systems;
- (v) satisfied minimum standards of economic and financial standing
- (vi) achieved the first, second, third, fourth and fifth highest combined weighted scores in respect of technical or professional ability calculated in accordance with the responses to Statements (b),(c) and (d) (refer to Section III.1.3).

However, if an economic operator has not submitted a compliant submission as described in (i) above, failed in respect of either (ii), (iii), (iv) or (v) above, then that economic operator shall be excluded from the ranking of scores described in (vi) as above.

In terms of Public Contracts (Scotland) Regulations 2015, there will be a requirement on economic operators to provide proof of economic and financial standing, and of technical and professional ability prior to proceeding to the next stage of competition and award. The tender documents will contain specific provisions requiring tenders to inform Transport Scotland of any changes to their economic and financial standing or technical and professional ability during the procurement competition.

Transport Scotland reserves the right to undertake further verification to ensure continuing compliance with the selection criteria at any time prior to proceeding to the next stage of the competition and contract award, including during any standstill period. If means of proof does not satisfy Transport Scotland's selection criteria and/or if an economic operator no longer meets the requirements set out in the tender documents, it shall be excluded from this procurement competition. If this follows tender evaluation, including during any standstill period, the next ranked most economically advantageous tenderer shall be requested to provide proof of economic and financial standing, and technical and professional ability with a view to executing an Agreement.



### **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.2.14) 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

## **II.2) Description**

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

Asset Management Technical Advice

Lot No

4

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

- 73200000 - Research and development consultancy services
- 73000000 - Research and development services and related consultancy services
- 73210000 - Research consultancy services
- 71310000 - Consultative engineering and construction services
- 71311000 - Civil engineering consultancy services
- 71311100 - Civil engineering support services
- 71311210 - Highways consultancy services
- 71311220 - Highways engineering services
- 71311300 - Infrastructure works consultancy services

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

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

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

The scope of the services for Lot 4 aim to deliver the following:

Access to specialist technical and academic advice to enable road related research to be quickly and efficiently undertaken by Transport Scotland on behalf of the Scottish Road Research Board.

Access to specialists who can provide advice and guidance in relation to the Design Manual for Roads and Bridges, Manual of Contract Documents for Highway Works, Transport Scotland Interim Amendments, European and British Standards and all other Transport Scotland Design Guidance and Technical Documents.

Support and advice on engagement with the Department for Transport, Highways Agency, other National and European organisations and devolved administrations.

Access to suppliers who can organise, undertake, and present conferences, workshops and seminars including events related to the communication of updated guidance and standards.

Access to suppliers who can support Transport Scotland in Technical Working Groups and research projects.

Delivers on legal duty as a road authority to comply with, and implement, national standards, including Construction Design and Management to be adopted on our road network

Delivers compliance with legal duties to comply with national design standards

Facilitates reviews of Departure from Standards applications for Major Projects capital schemes and Road and Bridge maintenance projects and third party developer works on the trunk road network.

Provide technical assistance as needed to review and develop standards and guidance for the design, operation, and maintenance of the trunk road network

Service has an integral role in Transport Scotland's promotion and development of major capital schemes, alongside the provision of advice for smaller schemes.

The Framework Contractor will be procured through a competitive tender procedure, in accordance with the restricted procedure as stated in the Public Contracts (Scotland) Regulations 2015. This is a two stage procedure, comprising a prequalification stage and a tender stage. Section II.2.9 of this Contract Notice describes the criteria for choosing the limited number of candidates. In order to be considered for the prequalification stage, economic operators are required to complete and submit a SPD, which can be downloaded via the Public Contracts Scotland site.

The Award Procedures for placing a Call-off Contract under this Lot shall be detailed within the ITT documentation.

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

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Duration in months

48

This contract is subject to renewal

No

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged number of candidates: 5

Objective criteria for choosing the limited number of candidates:

Objective criteria for choosing the limited number of candidates:

It is intended that five economic operators be taken forward to tender participation stage. These economic operators shall be those who have:

- (i) submitted a compliant submission, comprising the completed SPD
- (ii) satisfied the relevant selection criteria under the exclusion grounds
- (iii) (a) Minimum Standards of Eligibility - provided evidence to satisfy the eligibility criteria; and  
(b) Technical or Professional Ability - provided evidence demonstrating an acceptable level of technical or professional activity; and  
(c) Educational & Professional Qualifications - possess the necessary educational and professional qualifications to perform the requirement
- (iv) has in place quality, environmental and health and safety management systems;
- (v) satisfied minimum standards of economic and financial standing
- (vi) achieved the first, second, third, fourth and fifth highest combined weighted scores in respect of technical or professional ability calculated in accordance with the responses to Statements (b),(c),(d) and (e) (refer to Section III.1.3).

However, if an economic operator has not submitted a compliant submission as described in (i) above, failed in respect of either (ii), (iii), (iv) or (v) above, then that economic operator shall be excluded from the ranking of scores described in (vi) as above.

In terms of Public Contracts (Scotland) Regulations 2015, there will be a requirement on economic operators to provide proof of economic and financial standing, and of technical and professional ability prior to proceeding to the next stage of competition and award. The tender documents will contain specific provisions requiring tenders to inform Transport Scotland of any changes to their economic and financial standing or technical and professional ability during the procurement competition.

Transport Scotland reserves the right to undertake further verification to ensure continuing compliance with the selection criteria at any time prior to proceeding to the next stage of the competition and contract award, including during any standstill period. If means of proof does not satisfy Transport Scotland's selection criteria and/or if an economic operator no longer meets the requirements set out in the tender documents, it shall be excluded from this procurement competition. If this follows tender evaluation, including during any standstill period, the next ranked most economically advantageous tenderer shall be requested to provide proof of economic and financial standing, and technical and professional ability with a view to executing an Agreement.

#### **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.2.14) 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.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

Economic Operators must be enrolled in the relevant professional or trade registers kept in the Member state of its establishment (as described in Schedule 5 of the Public Contracts (Scotland) Regulations 2015) (i.e. registered under Companies House). Economic operators should provide details under Question Ref. 4A.1.a.

An economic operator participating on its own and which does not rely on the capacities of other entities in order to meet the selection criteria, must fill out one SPD.

An economic operator participating on its own but relying on the capacities of one or more other entities must submit to the contracting authority an SPD on its behalf together with a separate SPD on behalf of each of the entities being relied upon and setting out the relevant information.

Finally, where a group of economic operators, including temporary associations, participate together in the procurement procedure, a separate SPD setting out the information required under Parts II to IV must be given for each of the participating economic operators (excluding 4C.1.2 which will be answered only once by the group of economic operators).

#### **Management Systems**

Under SPD Question Ref 4D.1 and 4D.2, economic operators shall be required to demonstrate that they have in place appropriate quality, environmental and health and safety management systems.

Quality Management System. This may be European Foundation Quality Model (EFQM) or equivalent; BS EN ISO9001 (Quality Management Systems); other accredited management system or own non accredited management system.

Health & Safety Management System. This may be ISO 45001 (Occupational Health and Safety Management Systems) and associated standards; other accredited management system or own non-accredited management system.

Environmental Management System. This may be ISO 14001 (Environmental Management Systems); other accredited management systems or own non-accredited

management system.

Economic operators should specify their recognised accredited system or own non accredited system, which shall ultimately be adopted under the Framework Agreement. Economic operators who are unable to demonstrate that they have in place an appropriate quality, environmental and health and safety management system shall be assessed as a FAIL and shall be excluded from this procurement competition.

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

List and brief description of selection criteria

Economic Operators shall be required to satisfy minimum standards of economic and financial standing. To determine these standards, Economic Operators shall:

- (a) in response to SPD, Question Ref. 4B.1a provide the specified annual turnover for the last two years of trading, or for the period which is available if trading for less than two years;
- (b) in response to SPD, Question Ref. 4B.6 provide the name, value and/or range of NINE financial criteria for the last two years of trading, or for the period which is available if trading for less than two years; and
- (c) in response to SPD Question Ref 4B.5.1a, 4B.5.1b and 4B.5.2 confirm they already have or can commit to obtain, prior to commencement of the framework, the required levels of insurance;

In addition to the information requested under (a) and (b), economic operators are required to provide a link / copies of the associated annual accounts as filed at Companies House (or equivalent if not a UK registered company) for the last two years of trading, or for the period which is available if less than two years.

This information has been requested to enable Transport Scotland to perform their own assessment and confirm the financial ratios submitted. Ultimately, ensuring the correct score is allocated, and to ensure no misinterpretation. Where there exist differences in ratios, between those provided and those calculated by Transport Scotland, clarification will be sought.

Minimum level(s) of standards possibly required

Economic operators shall be required to satisfy minimum standards of economic and financial standing. These are described below:

Evaluation Criteria Ratios (Question Ref. 4B.6)

The financial information received under SPD, Question Ref. 4B.6 shall be evaluated and scored out of 50 by allocating a score against nine individual economic and financial standing evaluation criteria, namely:

1. Acid Test Ratio
2. Cash Interest Cover Ratio
3. Return on Capital Employed
4. Operating Profit Ratio
5. Net Worth
6. Gearing
7. Annual Contract Value to Turnover
8. Filed Accounts
9. Audit Report

The individual scores shall be weighted , with the most recent (“Year 1”) financial statements weighted at 67% and the previous (“Year 2”) statements being weighted at 33%, to form an aggregated score for each of the nine criteria over the two years.

The maximum cumulative score resulting from the summation of the nine economic and financial standing aggregated scores shall be 50 marks. A submission shall be marked as a FAIL and will not be considered further if the score achieved by a Single Economic Operator or a Group of Economic Operators is less than 50 percent of the available marks. The scoring mechanism can be downloaded via the Public Contracts Scotland portal [www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk).

Where the submission has been submitted by a Group of Economic Operators, the information submitted by each Group Member will be evaluated in the proportion of the percentage shareholdings or percentage equity/interest of each Group Member and a score determined for such Group of Economic Operators on that basis.

Insurance (Question Ref. 4B.5.1a, 4B.5.1b and 4B.5.2)

In response to Question Ref. 4B.5.1a and 4B.5.2 economic operators must confirm they already have or can commit to obtain, prior to the commencement the following levels of insurance:



Public Liability Insurance = 10,000,000 GBP

Professional Indemnity Insurance = 10,000,000 GBP

And, in response to Question Ref. 4B.5.1b economic operators must confirm they already have or can commit to obtain any other insurance, including Employers Liability, required by the Contract or by the appropriate legislation, with a sum insured / limit of indemnity to satisfy the Contract or legal requirements.

In responding to Question Ref. 4B.5.1a, 4B.5.1b and 4B.5.2 of the SPD, where the bidder ticks the box "No, and I cannot commit to obtain it" they shall be marked as FAIL and shall be excluded from this procurement competition

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

List and brief description of selection criteria

Under SPD, Question Ref. 4C.4 bidders will be asked to confirm If they intend to use a supply chain to deliver the requirements detailed in the Contract Notice. If they do, then they should confirm they have (or have access to) the relevant supply chain management and tracking systems to ensure a resilient and sustainable supply chain. This will include confirmation that they have the systems in place to pay subcontractors through the supply chain promptly and effectively, and provide evidence when requested of:

a) their standard payment terms

b) ?95% of all supply chain invoices being paid on time (in accordance with the terms of contract) in the last financial year.

If the bidder is unable to confirm (b) they must provide an improvement plan, signed by their Director, which improves the payment performance.

Under SPD, Question Ref. 4C.7 economic operators shall be required to provide details of the environmental management measures which they will be able to use when performing the contract. As part of the response to Question Ref. 4C.7 Economic Operators are also required to complete the "Priority Contract" Climate Change Plan Template which can be found in the additional documents section of the Contract Notice. The response shall be assessed on the basis of PASS or FAIL. Economic Operators will obtain a PASS where the production and submission of a Bidder Climate Change Plan has been reviewed and signed off by the board of directors (or equivalent management body). Economic operators who fail to provide the information required shall be excluded from the procurement competition.

Under 4C.1.2, economic operators will be required to insert suitable references to

Statements demonstrating that they have the required minimum standards of eligibility and technical and professional ability. The Statements themselves can be found in the Additional Documents section with titles:

Statements for Asset Management Improvement Service – Lot 1

Statements for Asset Management Performance System – Lot 2

Statements for Geotechnical Certification Service – Lot 3

Statements for Asset Management Technical Advice – Lot 4

The Statements vary between Lots. The selection criteria/scoring for each Statement is detailed in the SPD.

Minimum level(s) of standards possibly required

The Additional Documents section includes Technical and Professional Ability Statement documents specific to each of the four Lots. These Statements should be answered using the Relevant Examples and Statements Table documents specific to each of the four Lots.

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

### **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**

Restricted 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

#### **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

22 November 2023

Local time

12:00pm

#### **IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates**

4 March 2024

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

English

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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**

Transport Scotland will conduct the proposed procurement process for the Framework Agreement on behalf of the Scottish Ministers. In the event of the conclusion of the Contract, it is the intention that the Contract will be entered into between the Scottish Ministers and the most economically advantageous tenderers. The Framework Agreement will operate in accordance with the Scottish Government's Model Services Framework Agreement, and the Call Off Contract Terms and Conditions will be based on the Scottish Government's Conditions of Contract. Each economic operator shall be invited to submit a Tender on the same contract terms. TS envisage appointing three service providers to each Lot. To be considered for this procurement competition, economic operators should complete a SPD through the Public Contract Scotland portal and submit the completed SPD by no later than 12 noon GMT on 22 November 2023.

The Scottish Ministers shall not evaluate any SPD submission received past the specified deadline, unless the delay is caused by a situation outwith the control of the economic operator, the determination of which shall be at the sole discretion of the Scottish Ministers. Compliance in achieving the specified deadline is the sole responsibility of the economic operator. Economic operator are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time.

Economic operators who alter their composition after making a submission or whose position has materially changed will be the subject of re-evaluation. Transport Scotland reserves the right, at any point, to request current and up-to-date information to enable re-evaluation of any economic operator. As set out in accordance with section II.2.9 above, an economic operator who no longer has the requisite: technical or professional ability; educational and professional qualifications; or economic and financial standing, as required under the Contract Notice shall be excluded from this procurement competition.

Any request by economic operators for clarification of any part of the documentation shall be made using the Question and Answer feature on the Public Contracts Scotland portal.

If the query is commercially sensitive, then it should be made to the following email address:

[Stephen.breslin@transport.gov.scot](mailto:Stephen.breslin@transport.gov.scot).

Please refer to the Supplementary Additional Information Document for full additional information.

Please note there are minimum Cyber Security requirements for this contract.

Tenderers will be asked to confirm that they will pay staff based in the UK that are involved in the delivery of services under the Framework Agreement at least the real Living Wage.

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=733342](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=733342).

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.

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:

To be provided within Contract Documents which will be made available at tender stage.

(SC Ref:733342)

Download the ESPD document here:

[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=733342](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=733342)

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

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

Sheriff Clerk's Office

Glasgow

Country

United Kingdom