



Department
for Environment
Food & Rural Affairs

Bidder Pack

Part Two: Procurement Specific Requirements

**Strategic File Management: Procurement of
Enterprise Asset Management Common Data
Environment (CDE)**

Procurement Reference Number C33060

FEB / 2026

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Section 1: The Invitation

This procurement is being carried out by Defra group Commercial in accordance with the Competitive Tendering Procedure as set out in the Procurement Act 2023 on behalf of the Environment Agency (EA).

All procurement activities and contractual obligations arising from this Bidder Pack will be governed by the Procurement Act 2023. Bidders are required to comply with the Act's stipulations, ensuring transparency, fairness, and integrity throughout the procurement process.

The Bidder Pack comes in two parts.

The first part, **The Core Requirements**, provides details of the General Requirements, Government Transparency Agenda and Government Priorities.

This, the second part, **the Procurement Specific Requirements**, provides details of the Specification Requirements, Terms and Conditions of Contract, Evaluation Methodology, Procurement Timetable and Definitions.

The tendering process seeks to determine the Most Advantageous Tender (MAT). The Authority will evaluate the Tenders using the tender evaluation criteria and weightings listed in Section 4, Evaluation Methodology.

The Opportunity

This opportunity is advertised by Defra group Commercial (DgC) on behalf of the Environment Agency (EA), the Authority.

The EA is an executive non-departmental public body, sponsored by the Department for Environment, Food & Rural Affairs, supported by 1 public body. The EA works to create better places for people and wildlife, and supports sustainable development. For further information about EA please visit Environment Agency - GOV.UK.

The procurement termed “**Strategic File Management: Procurement of Enterprise Asset Management Common Data Environment (CDE)**” (“**SFM-CDE**”), seeks to award a contract to a single supplier for the provision of a replacement Commercial-off-the-Shelf (COTS) Common Data Environment core solution to unify asset management file processes to support whole lifecycle asset management information across EA Asset Management systems. This solution will serve as a single, consistent source of truth for all Asset Management files and data – past and present – across the full asset lifecycle.

The Authority's vision is to be recognised as a world class Asset Management (AM) organisation, and the effective management of AM files and information is an essential component to achieving this.

The Authority’s management of AM files is currently fragmented with storage in a variety of formats, standards and locations, on a wide number of IT systems such as Asite, AMX, SharePoint and other networked file shares SaaS solutions, cloud storage, and other network drives. While the Authority has several file management solutions in place, it does not have a common approach to managing files and information. This has a variety of impacts felt across the board, both strategically and politically.

The consequences of the current approach to file management means that the Authority is:

Issue	Impact / Explanation
Not ISO Compliant	The disaggregated approach in how essential AM files are managed across the lifecycle means we are not fully compliant to ISO55000 and 19650.
Costly Document Recreation	The disaggregated and local approaches to managing essential AM files can result in their recreation or re-procurement
Poor User Experience	Current disaggregated approach makes it time consuming and difficult to find authoritative AM files leading quickly and easily leading to a poor staff experience
Duplicate Information & Workload	Duplicating information for different purposes and creating additional workload by storing files in multiple locations, which can impact decision making.
Risk of Litigation	An Increased risk of litigation, where information cannot be provided as evidence.
Decreased Quality of Information	At risk of decisions being made without benefit of the best information available

The Authority is therefore seeking a supplier who can provide a product to deliver all SFM-CDE requirements as detailed under section 2 of this document. This includes, but is not limited to, the supplier being required to provide full implementation, transition, data migration support, initial training, as well as initial - and ongoing - technical support, with all necessary system maintenance and upgrades throughout the contract term.

Tenderers will be invited to a Supplier Engagement Event via Microsoft Teams so that we may present the opportunity in further detail and provide Tenderers an opportunity to raise any Clarification Questions around the procurement or Tender process. Further details on the agenda and how to confirm attendance to the Event will be communicated via Atamis with all potential Tenders on (TBC – w/c 19.01.26). Tenderers are responsible for ensuring the availability of their nominated attendees. It is essential that potential Tenderers manage their internal scheduling to accommodate the pre-scheduled event.

The Supplier Engagement Day will not form part of the tender stages for response and will not be evaluated. The event is for information only.

Tenderers will also be invited to a Supplier Engagement Event via Microsoft Teams so that we may present the opportunity in further detail and provide Tenderers an opportunity to raise any Clarification Questions around the procurement or Tender process. Further details on the agenda and how to confirm attendance to the Event communicated via Atamis with all potential Tenders on (TBC- w/c 19.01.26). Tenderers are responsible for ensuring the availability of their nominated attendees. It is essential that potential Tenderers manage their own internal scheduling to accommodate the event.

To clarify, the Supplier Engagement Event is for information purposes only and will not be evaluated.

All suppliers must be registered on the Authorities eSourcing system (Atamis). All supplier communications will be issued solely through this system. Communications relating to this procurement opportunity including clarification questions will be received and responded to with appropriate responses. Please follow this link to register: <https://atamis-9529.my.site.com/s/Welcome>

Timetable

The timetable below is subject to change from time to time as notified by the Authority. All Tenderers will be informed via the Authority's eSourcing system (Atamis).

Procurement Activity (Procurement Act 2023 regime applies)	Actual/Anticipated Date ¹
Tender Notice issued	19/02/26
Publish above Threshold Notice and Bidder Pack	20/02/26
Supplier Engagement Event	26/02/26
Clarification Window	19/02 – 05/03 at 4:00pm (UK time)
Stage 1 – Pre Selection	
Stage 1 Response date	16/03/26 at 4:00pm (UK time)
Compliance Checks	17/03 – 20/03
Evaluation	20/03 – 06/04
Moderation Meeting	07/04 – 09/04
Release Stage 1 Results	13/04/26
Stage 2 – Invitation to Final Tender	
Stage 2 Published	14/04/26
Stage 2 CQ Period	14/04 – 28/04 at 4:00pm (UK time)
Stage 2 Full Tender Response date	14/05/26 at 4:00pm (UK time)
2A – Demonstration	
Demo Sessions	18/05 – 19/05
Demo Evaluation	20/05 – 27/05
Demo Moderation	28/05 – 29/05
2B – Proof of Concept	
PoC Live Environment Testing / Evaluation Period	01/06 – 10/06
PoC Moderation	11/06 – 12/06
2C – Quality Envelope & Commercial Envelope	
Quality Evaluation	15/06 – 26/06
Quality Moderation	29/06 – 01/07
[Optional] Final Clarification & Negotiation	02/07 – 16/07
Commercial Evaluation	17/07 – 20/07
Issue Assessment Summaries to tenderers	15/09*
Mandatory (8 Working Days) Standstill Period	15/09 – 28/09*
Contract award	28/09/26*
Contract Start Date	12/10*

¹ Potential Suppliers should not that all dates with an asterisk (*) are indicative and are therefore liable to change

Procurement Activity (Procurement Act 2023 regime applies)	Actual/Anticipated Date ¹
Handover Period	12/10/26 – 04/01/27*
Service Commencement Date	05/01/27*

All timescales are set using a 24-hour clock and when referring to “days” it means calendar days unless otherwise specified (for example, working days).

This procurement is being delivered under tight timescales, and Tenderers are expected to make every effort to meet the deadlines set out in the procurement timetable. The timeline has been carefully scrutinised and agreed with key stakeholders, and is considered both reasonable and achievable. As such, requests for extensions (to the Clarification Question or Response deadlines) are very unlikely to be granted.

Variant Tenders

The Authority shall not accept variant Tenders.

For the avoidance of doubt, if the Authority has reserved a right to waive a requirement in this Bidder Pack and chooses to exercise such discretion, the Tender will not be considered a variant Tender.

Abnormally Low Price

If the Authority considers the price offered in your Tender to appear abnormally low for the performance of the contract, an initial assessment will be undertaken using a comparative analysis of the pricing proposals received from all Tenderers and the Authority’s valuation of the procurement. If that assessment indicates that your price is abnormally low, the Authority will request a written explanation of your Tender, or of those parts of the price offered by your Tender which the Authority considers contribute to your price being abnormally low. The Authority reserves the right to reject your Tender if the response does not satisfactorily account for the low level of price or costs proposed.

The assessment of abnormally low prices will be undertaken strictly in accordance with Section 19 of the Procurement Act, which outlines how abnormally low prices must be assessed and the circumstances in which the contracting authority can reject the tender.

Pricing Anomalies

If in the opinion of the Authority your Tender contains any pricing anomalies (for example

apparent discrepancies between the financial submission and other parts of your response) the Authority may seek clarification. If the clarification response indicates that the pricing anomaly was the result of a clear and obvious error, in the interest of fairness the resulting change will be taken into consideration. If the clarification response results in a change to the initial tendered Commercial Response and price, it will not be taken into account.

Procurement Process

This tender will consist of 2 separate stages for pre-selection and final tender. Both stages will consist of separate sub-categories of evaluation as highlighted in the table below.

Stage Title	Stage #	Sub-Category	Total Weighting % (out of 100)
Pre-Selection Stage	1A	Procurement Specific Questionnaire (PSQ)	Pass/Fail
Pre-Selection Stage	1B	Technical Envelope	100 %
Final Tender Stage	2A	Demonstration (Demo)	8%
Final Tender Stage	2B	Proof of Concept (PoC)	12%
Final Tender Stage	2C	Quality Lens Questions (Quality Envelope)	40%
		Social Value Lens Question	10%
		Price (Commercial Envelope)	30%

Further details on the Response Instructions documents for each stage respectively are available under section 4 of this document and corresponding appendices.

Pre-Selection (Stage 1)

This stage will be split in two parts:

- **1A: Procurement Specific Questionnaire (PASS/FAIL)**
- **1B: Mini Technical Envelope (Scored)**

The purpose of the selection questions is to enable the Authority (EA) to assess the economic and financial standing and the technical and professional ability of Potential Suppliers.

The Authority intends to invite the highest scoring Potential Suppliers from the Pre-Selection Stage to participate in the Final Tender Stage. The indicative number of suppliers to be invited is six (6). However, the Buyer reserves the right, at its sole discretion, to increase this number to a maximum of eight (8) or reduce it to a minimum of four (4), based on the quality and

competitiveness of responses received. This flexibility is intended to ensure that the Final Tender Stage includes an appropriate level of competition while maintaining fairness and transparency.

Suppliers will be required to respond to all questions under both parts of the selection stage. Should a supplier fail any of the questions in response to Part 1A they will be removed from the process, meaning their Part 1B responses will not be considered for evaluation.

1A: Procurement Selection Questionnaire (PSQ)

Procurement Specific Questionnaire (PSQ) responses submitted in response to the Tender Notice. Additional questions have been added to the standard template used in line with the Digital, Data, Technology and Security (DDTS) strategy and the wider government data and security policies.

1B: Mini Technical Envelope

This scored envelope contains project specific questions also drafted with DDTS project team assistance to provide additional technical guard rails for this procurement. Potential Suppliers must answer against the following subject areas.

Access to full Stage 1 response instructions details can be found under Section 5 (Appendices) of this document.

Final Tender (Stage 2)

2A: Demonstration Phase

The 4 shortlisted suppliers will be invited to deliver a live demonstration of their proposed CDE solution. The purpose of the demo is to evidence outcome-based capabilities aligned with industry standards (including ISO 19650), interoperability with existing data systems, and ease of administration for a broad user base.

Each supplier is expected to demonstrate how their solution delivers the required outcomes in a practical, user-focused way. Particular attention should be given to administration, user experience without prior training, and extensibility of metadata.

2B: Proof of Concept (PoC)

To increase confidence in the capabilities of the proposed solution, it is proposed that Potential Suppliers develop and present a light-weight software prototype of the SFM system which demonstrates a sub-set of capabilities (the “Proof of Concept”) in the Demonstration Phase. The Proof of Concept will therefore be required to demonstrate a limited number of capabilities. Detailed logistics for the Proof of Concept will be shared in the Invitation to Demonstrate.

2C: Quality Lens Questions

Once the most advantageous Final Tender has been identified, the EA will undertake verification checks. For the Most Advantageous Tender (MAT) which has passed verification checks, the EA will seek internal approval of the tender assessment. Following this approval, the EA intends to award contracts on the basis of this Final Tender (subject to completion of the mandatory standstill period).

Access to full Stage 2 response instructions details can be found under the Section 5 (Appendices) of this document.

Final Score

More details can be found under section 4.

Final Clarification and Negotiation (*Optional*)

Following completion of the evaluation of all elements of the Final Tender Stage (including demonstrations, proof-of-concept activities, quality responses, social value, and pricing), the authority reserves the right to undertake an optional final clarification and negotiation step with the tenderers still in competition.

This may include:

- clarification of ambiguities or minor omissions in tender responses;
- correction of clerical or computational errors;
- limited negotiation of commercial terms; and/or
- a request for a ‘Best and Final Offer (BAFO)’, which will be invited on an equal basis from all tenderers who remain eligible at that stage.

Suppliers must note that this step is optional, may not be invoked, and will not permit material amendment of solutions or changes that would distort the competition. The scope of permitted clarifications or negotiations will be controlled by the authority to ensure fairness, transparency and compliance with the Procurement Act 2023.

Contact Award

For the Most Advantageous Tender (MAT) which has passed verification checks, the EA will seek internal approval of the tender assessment. Following this approval, the EA intends to award contracts on the basis of this Final Tender (subject to completion of the mandatory standstill period).

Section 2: The Specification of Requirements

The Authority's Priorities

The Authority oversees infrastructure assets across England, playing a vital role in Flood and Coastal Risk Management (FCRM), waterways navigation, and safeguarding water resources. Effective and sustainable management of associated files, data, and information is essential to reduce risks to people and wildlife.

Digital Asset Data & Information

Creating Asset Management Capacity (CAMC) is part of the Asset Management programme of change projects. Digital Asset Data Information (DADI) is a digital programme of work within CAMC. Digital Asset Data and Information (DAD) is a digital programme within the Asset Management Programme of improvement projects, with a whole life focus on how the Environment Agency as an owner-operator will digitally create, maintain and operate its asset estate in the future.

Strategic File Management (SFM)

As part of the DADI programme, the Strategic File Management (SFM) project underpins the Agency's ambition to be recognised as a world-class AM organisation. The SFM goal is to deliver a solution for the management of the Environment Agency's AM files which will be based on standardised and governed processes and include the supporting technological capability to carry out these processes. The desired solution will ensure that documentation relevant to an asset's entire lifecycle is effectively managed and can be retrieved and accessed by a wide range of users in a number of formats.

Objectives

The key objectives of this procurement are as follows:

- Implement a compliant, centralised file management system.
- Create a single source of truth supporting the entire asset lifecycle.
- Enable accurate, trusted Business Intelligence.
- Achieve ISO19650 and ISO55000 compliance.
- Improve file accessibility, storage, sharing, and user experience.

- Enhanced data governance and risk mitigation (e.g. Reduced security and legal risks).
- Reduced inefficiencies, such as duplication and process waste.
- Support carbon reduction and improved sustainability through streamlined practices.

DEFRA Group strategies

This procurement is aligned with the following Defra Group strategies and wider government standards:

EA's Asset Management Strategy

The Environment Agency Asset Management Strategy sets out how the EA will manage its large asset base to protect people, the environment and economic growth. It focuses on safe, reliable and sustainable assets, whole-life asset management, improved data quality and stronger assurance. The strategy emphasises consistent standards, better information flow from capital to operations, and decision-making based on trusted asset data, all of which Strategic File Management directly supports.

EA DADI Programme initiatives

The Digital Asset Data and Information (DADI) programme is a coordinated approach to improving how asset data and information are defined, governed, digitised and used across the asset lifecycle. DADI initiatives aim to reduce fragmentation, enable automation, and create a single source of truth through standardised data requirements, processes and platforms. SFM is a core enabling capability within DADI, providing the structured file management, metadata and information flow needed for downstream analytics, assurance and operational use.

EA's Asset Management Digital Twin Strategy

The Asset Management Digital Twin Strategy defines how the EA will progressively create digital capability to support planning, risk management and operational decision making. It relies on high-quality, structured and accessible information spanning design, delivery, operation and maintenance. Strategic File Management underpins this strategy by ensuring asset files are consistently structured, discoverable and connected to asset data, enabling digital capability to be trusted, scalable and valuable over time.

DEFRA Digital and Data Transformation Strategy - The strategy shows how we intend to use technology and changes to ways of working to enable the delivery of Defra group's outcomes in future. It covers how we will:

- design services
- use data
- attract and grow digital skills
- change how we work

Implementing the strategy will make Defra group more service orientated. We will deliver our outcomes more efficiently and become easier to do business with.

Full details on this strategy can be found on GOV.UK - Defra digital and data transformation strategy 2023 to 2030

Digital, Data and Technology Playbook (DD&T) - The Digital, Data and Technology (DDaT) Playbook provides guidance on sourcing and contracting for digital, data and technology projects and programmes. There are 11 key policy reforms for how the government should assess, procure and deliver digital projects and programmes which all central government departments and their arm's length bodies are expected to follow on a 'comply or explain' basis.

A [guidance note on dealing with legacy IT](#) has been published alongside the playbook.

Full details on this strategy can be found on GOV.UK - [The Digital, Data and Technology Playbook - GOV.UK](#)

Defra digital sustainability strategy 2025 to 2030 - The Defra digital sustainability strategy aims to make its tech operations sustainable by tackling carbon, e-waste, and resource use, focusing on circularity, social value, supply chain transparency, and resilience, with key targets like reducing IT carbon by 16%, using 80% refurbished devices, and setting sustainability weightings in procurements, embedding green principles across its Digital & Data strategy for a net-zero public sector.

Key Objectives:

- Carbon Reduction: Achieve net-zero goals by cutting IT carbon, encouraging suppliers with net-zero plans, and using greener principles.

- Resource Efficiency: Reduce e-waste, improve water management in data centres, and increase refurbishment/reuse of hardware.
- Circularity: Promote a circular economy for technology, focusing on extending product life.
- Social Value: Minimise social risks and maximize benefits in digital services.
- Transparency & Accountability: Increase openness in the supply chain, requiring suppliers to report data.
- Resilience: Strengthen technology against climate and environmental risks.

Full details on this strategy can be found on GOV.UK - [Defra digital sustainability strategy 2025 to 2030 - GOV.UK](#)

Wider Government standards

Cyber Essentials

[PPN 014: Cyber essentials scheme \(HTML\) - GOV.UK](#)

International Organization for Standardization (ISO)

The following ISOs:

- ISO/IEC 27001 (Information Security Management)
- ISO 9001 (Quality Management)
- ISO/IEC 27001 (Information Security Management)
- ISO 19650 (Managing Information with Building Information Modelling (BIM))
- ISO Format 8601 (Numeric representations of date and time)

Web Content Accessibility Guidelines (WCAG 2.2)

[Web Content Accessibility Guidelines \(WCAG\) - DWP Accessibility Manual](#)

UK Government Secure by Design

[Secure by Design - UK Government Security - Beta](#)

Wider Government Priorities

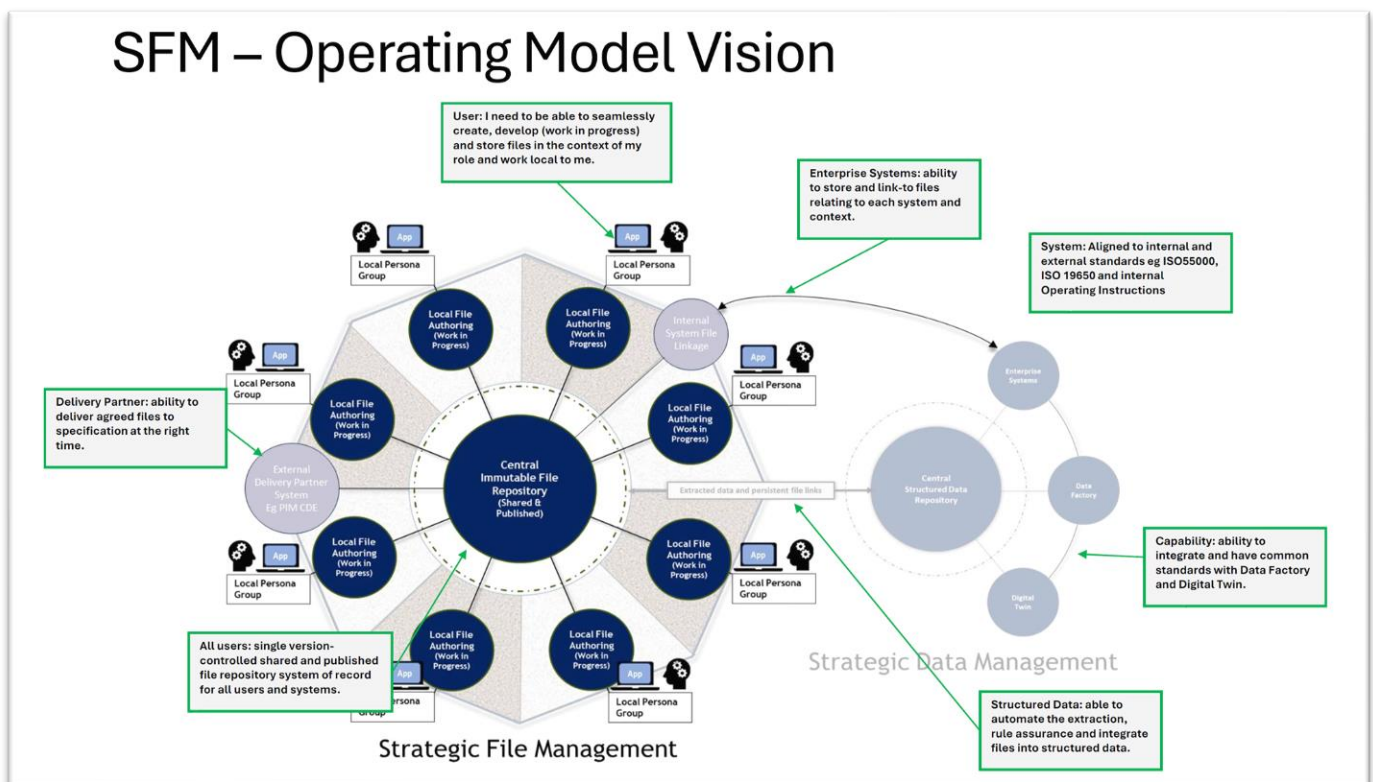
Government priorities as detailed under section 3 of the Bidder Pack (part one) Core Requirements document.

Scope

Appendix 3a sets out the Specification of Requirements. The Supplier's proposed solution must demonstrate the ability to cater for and comply with all requirements specified herein.

High-Level Requirement

The in-scope services and High-Level Requirements and the NFRs are set out in Appendix 3b. These cover the extent of Outcomes A, B and C, outlined in the SFM Operation Model Vision set out below (Appendix 1c, under the supporting documents folder on the Atamis). The anticipation is that depending on the solution that there could be some flexibility in how the High-level Requirements & NFRs align with Outcomes.



In order to fully assess the options available, EA seek to review suitable COTS offerings that can meet all of the defined outcomes. The COTS solution must also integrate with the existing Asset Management and IT systems in respect to:

- File Management storage
- Workflow Management in relation to file management

- A methodology and workflow for specifying, procuring, managing delivery and maintaining records currently known as the Information Delivery Plan which is currently a feature of Asite built to our specifications.

Key Performance Indicators

Before entering a contract with a total estimated value of more than £5m, at least three key performance indicators (KPIs) must be set. The three most appropriate KPIs need to be published as part of the contract details notice.

The performance against these KPIs must be assessed and published on at least an annual basis for the remainder of the contract. Therefore, it is important that Tenderers understand the KPIs that will apply and that they are acknowledged within Tender responses.

Conditions of Participation

These questions relate to the Procurement Specific Questionnaire (PSQ) in Atamis for Selection Stage 1A where the Authority specifies a minimum level of requirement to be met. Response instruction details for the PSQ can be found in Appendices 5a under the supporting documents folder on the Atamis system.

Insurance Cover. Atamis Reference 3.A.15a

Please confirm whether you already have, or can commit to obtain, prior to the award of the contract, the levels of insurance cover indicated below:

- Employer's (Compulsory) Liability Insurance* = £10,000,000 (ten million)
- Public Liability Insurance = £10,000,000 (ten million)
- Professional Indemnity Insurance = £10,000,000 (ten million)
- Product Liability Insurance = £10,000,000 (ten million)
- Cyber Liability Insurance = £5,000,000 (five million)

Supplier Guidance: There is a legal requirement for certain employers to hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. See the Health and Safety Executive website for more information: www.hse.gov.uk/pubns/hse39.pdf.

Financial Capacity to Deliver the Contract. Atamis Reference 3.A.13c

The Authority will review the economic information provided as part of the Procurement Specific Questionnaire response to evaluate a Tenderer's economic and financial standing. The Authority's evaluation will be based on all the information reviewed and will not be determined by a single indicator. If, based on its assessment of the information provided in a Response, the Authority decides that a Tenderer does not meet the Authority's required level of economic standing, the Authority may:

- ask for additional information, including information relating to the Tenderer's parent company, if applicable; and/or
- require a parent company guarantee, performance bond or other security.

If the Authority decides that a parent company guarantee, performance bond or other security is required, the Authority will reject a Response if the Tenderer is unable to offer a commitment to make such provision. In addition to the information provided in a Response, the Authority may, at its discretion, consult Dun & Bradstreet reports and other credit rating or equivalent reports depending on where a Tenderer is located.

The Authority's assessment of economic and financial standing will consider financial strength and risk of business failure. Financial strength is based on tangible net worth and is rated on a scale of 5A (strongest) to H (weakest) obtained from Dun & Bradstreet. There are also classifications for negative net worth and net worth undetermined (insufficient information). Financial strength will be assessed relative to the estimated annual contract value.

The Authority will also consider annual turnover. For this procurement, the Authority expects the contractor to have an annual turnover for each of its last two financial years of at least £705,000 GBP or 125 % of the contract value, whichever is *lower*.

In the case of a joint venture or a consortium bid, the annual turnover is calculated by combining the turnover of the relevant organisations in each of the last two financial years. In addition, the annual turnover of at least one of those organisations is expected to be £420,000 GBP or 60% of the contract value, whichever is *lower*.

Risk of Business Failure is rated on a scale of 1 (minimal) to 4 (significant) obtained from Dun & Bradstreet. There is also a classification of insufficient information. The Authority regards a

score of 4 as indicating inadequate economic and financial standing for this procurement. The Authority will also calculate and evaluate the Tenderer's:

- operating performance: growth or reductions in sales, gross profit, operating profit, profit before tax and earnings before interest, tax, depreciation, amortisation, exceptional items and profit/loss on sale of businesses;
- liquidity: net current assets, movements in cash flow from operations, working capital and quick ratios, and average collection and payments periods; and
- financial structure: gearing ratios and interest cover.

Procurement Policy Note Compliance

Part 3B – requirements for central government departments, their executive agencies and non-departmental public bodies.

Note: This procurement is under the threshold (£5 million per annum) for PPN015 Payment in Contracts and PPN006 Carbon Reductions Plans to be a mandatory requirement for the Authority or Suppliers, but these requirements are an important consideration for the Authority when assessing and contracting with Suppliers, therefore a reduced set of questions from the standard PSQ template will apply.

PPN Number	Title / Theme
PPN 006	Carbon Reduction Plan
PPN 009	Tackling Modern Slavery in Supply Chains
PPN 014	Cyber essentials scheme
PPN 015	Payment in Contracts
PPN 017	Use of AI in Procurement

Payment in Contracts ([PPN 015](#))

1. Please confirm if you intend to use a supply chain* to deliver any call-off contract that may be awarded under this framework agreement. If you answer “No” you do not need to complete the rest of this section [questions 2-4]

[Information only]

*References to supply chain means suppliers or sub-contractors of any tier that execute any works, supply any products or provide any services that are used wholly or substantially for the purpose of performing (or contributing to the performance of) the whole or any part of the contract.

[Yes or No]

Not scored

2. Please confirm that you have systems in place to pay those in your supply chain promptly and effectively, i.e. within your agreed contractual terms.

[Yes/No]

Pass/fail

3. Requirement under the Procurement Act 2023 (Sections 68 and 73)

Please confirm that for public sector contracts awarded under the Procurement Act 2023 you have systems in place to include (as a minimum) 30-day payment terms in all of your supply chain contracts and require that such terms are passed down through your supply chain.

[Yes/No]

Pass/fail

Carbon Reduction Plan ([PPN 006](#))

Has your organisation have detailed your environmental management measures by completing and publishing a Carbon Reduction Plan which meets the required reporting standard.

[Yes / No]

[Provide a link to your most recently published Carbon Reduction Plan here:]

1. Please confirm that your organisation is taking steps to reduce your GHG emissions over time and is publicly committed to achieving net zero by 2050.

[Yes / No]

2. Please confirm your Net Zero Target Date (e.g. 2050)

[Yes / No]

Tackling Modern Slavery in Supply Chains ([PPN 009](#))

Modern Slavery Statement (or equivalent statement/document)

Supplier is 'a relevant commercial organisation'* and is compliant with the requirements contained within section 54 of the Modern Slavery Act 2015 and associated guidance and their statement includes information relating to:

- a. the organisation's structure, its business and its supply chains
- b. its policies in relation to slavery and human trafficking
- c. its due diligence processes in relation to slavery and human trafficking in its business and supply chains

d. the parts of its business and supply chains where there is a risk of slavery and human trafficking taking place, and the steps it has taken to assess and manage that risk

e. its effectiveness in ensuring that slavery and human trafficking is not taking place in its business or supply chains, measured against such performance indicators as it considers appropriate f. the training and capacity building about slavery and human trafficking available to its staff

f. the training and capacity building about slavery and human trafficking available to its staff

[Yes / No]

Or

Supplier is not 'a relevant commercial organisation' but has provided a link to an equivalent statement or document which demonstrates information relating to a to f above.

[Yes / No]

[Insert information]

*'Relevant commercial organisations' are defined as commercial organisations that carry on a business or part of business in the UK, supply goods or services and have an annual turnover of £36 million or more.

Or

Supplier has a turnover of less than £36 million, and has attached a copy of its Modern Slavery Policy, or a link to the document, which should broadly align with the information listed in 3.B.3a relating to points a-f.

[Insert information]

Use of AI [\(PPN 017\)](#)

AI tools can be used to improve the efficiency of your bid writing process, however they may also introduce an increased risk of misleading statements via 'hallucination'.

Have you used AI or machine learning tools, including large language models, to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions.

[Insert information]

AI tools can be used to improve the efficiency of your bid writing process, however they may also introduce an increased risk of misleading statements via 'hallucination'.

Please detail any instances where AI or machine learning tools, including large language models have been used to generate written content, or support your tender submission.

[Insert information]

Where AI tools have been used to support the generation of Tender responses, please confirm that they have been checked and verified for accuracy:

[Insert information]

Are AI or machine learning technologies used as part of the products/services you intend to provide should you be successful in your tender?

[Insert information]

Please describe how AI technologies are integrated into your service offerings.

[Insert information]

Section 3: Terms and Conditions of Contract

Appendix 2 sets out the terms and conditions of Contract.

The Terms and Conditions of Contract for this procurement are Mid-Tier contract. The Terms and Conditions are split into Core Terms and Contracting Authority Terms and details of the legal priority are provided in Section 13 (Incorporated Terms) of the Contract Award Form for the Mid-Tier Contract.

The following documents in the table below will be incorporated into the Mid-Tier Contract. Where numbers are missing, we are not using those schedules.

Mid-Tier Contract - Document Title ²
Mid-Tier Core Terms
Mid-Tier Award Form
Mid-Tier Schedule 1 (Definitions)
Mid-Tier Schedule 2 (Specification)
Mid-Tier Schedule 3 (Charges)*
Mid-Tier Schedule 4 (Tender)
Mid-Tier Schedule 5 (Commercially Sensitive Information)
Mid-Tier Schedule 6 (Intellectual Property Rights)
Mid-Tier Schedule 7 (Staff Transfer)
Mid-Tier Schedule 8 (Implementation Plan and Testing)*
Mid-Tier Schedule 10 (Performance Levels)
Mid-Tier Schedule 11 (Continuous Improvement)
Mid-Tier Schedule 12 (Benchmarking)
Mid-Tier Schedule 13 (Contract Management)
Mid-Tier Schedule 14 (Business Continuity and Disaster Recovery)
Mid-Tier Schedule 16 (Security) ³
Mid-Tier Schedule 19 (Corporate Resolution Planning)
Mid-Tier Schedule 20 (Processing Data)
Mid-Tier Schedule 21 (Variation Form)
Mid-Tier Schedule 22 (Insurance Requirements)
Mid-Tier Schedule 23 (Guarantee)
Mid-Tier Schedule 24 (Financial Difficulties)
Mid-Tier Schedule 25 (Rectification Plan)

² Potential Suppliers should not that all Contract Documents labelled with an asterisk (*) are for Stage 2 Tender release ONLY

³ The Authority has identified two possible options dependents on the type of solution proposed – A single option under contract TBD once supplier award is confirmed)

Mid-Tier Contract - Document Title ²
Mid-Tier Schedule 26 (Sustainability)
Mid-Tier Schedule 27 (Key subcontractors)
Mid-Tier Schedule 28 (ICT Services)
Mid-Tier Schedule 28A (Agile Development)
Mid-Tier Schedule 30 (Exit Management)

The Authority proposes to enter into Contract(s) for a maximum period of 10 years with the successful Tenderer(s).

The initial contract term shall be 5-years with the potential for 2 optional extension periods of up to 24-months each and 1 optional extension period of up to 12-months (for the avoidance of doubt, 5+2+2+1). The anticipated commencement date is August 2026.

Suggested Changes to Conditions of Contract

Tenderers may raise clarification questions relating to the amendment of contract terms during the clarification period only, as specified in the Timetable, if it can be demonstrated that there is a legal or statutory reason why they cannot be accepted. Where a legal or statutory reason cannot be substantiated the Authority has the right to reject the proposed changes.

Such requests must follow the Clarifications Sought by the Tenderer process set out in the Core Requirements element of this Bidder Pack.

Section 4: Evaluation Methodology

The overall aim of the evaluation process is to select the Tender that is the most advantageous to the Authority, having regard to the Authority's overall objectives and the criteria set out below.

Evaluation of Tenders will comprise of the stages set out in the table below.

The Authority will carry out its evaluations of the Technical and Commercial elements according to the criteria, sub-criteria and weightings set out in the table below:

Refinement of Award Criteria

The Authority may refine the Evaluation criteria outlined in this Bidder Pack and related documents during the procurement process in accordance with the Procurement Act 2023. This is to ensure that the criteria, sub-criteria and weightings remain aligned with the objectives and requirements of the project.

Any such refinements will be notified to all Tenderers in writing via the Atamis System in accordance with the Procurement Act 2023. Tenderers are encouraged to review the tender documents regularly for any updates.

PRE-SELECTION (STAGE 1)

	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Procurement Specific Questionnaire (PSQ)	PSQ responses submitted in response to the Tender Notice. Part 1: covers the basic information about the supplier (or organisation relied upon to meet the selection criteria in Part 3), such as the contact details, trade memberships, details of parent companies, group bidding and so on and is provided for information only. Part 2: covers a series of self-declarations by the supplier (or organisation relied upon to meet the selection criteria in Part 3) regarding whether or not any of the questionnaire exclusion grounds apply and will be assessed on that basis. Part 3: covers a series of self-declaration questions regarding whether the company meets the selection criteria in respect of their financial standing and technical capacity. Response instruction details can be found in Appendix 3a under the supporting documents folder on the Atamis system.	Pass/Fail This stage will be evaluated in accordance with the criteria set out in set out in the Response Instructions document (Appendix 3a).

Evaluation Stage 1A:

Procurement Specific Questionnaire (PSQ)

Evaluation Stage 1B: Mini-Technical Envelope	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Technical Envelope	Technical Envelope contains a number of project specific questions, which Potential Suppliers must answer against the following subject areas. Response instruction details can be found in Appendix 3a under the supporting documents folder on the Atamis system.	Scored This stage will be evaluated in accordance with the criteria set out in the Response Instructions document (Appendix 3a).
Form of Tender	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Form of Tender	This stage is <u>not scored</u> but if you do not upload a complete, signed and dated Form of Tender in accordance with the instructions in the Atamis System (Atamis reference 4.32.a)/accept the Form of Tender statement in the PSQ your Tender will be rejected as non-compliant.	Pass/Fail
Note that every organisation that forms part of your bidding group/consortium, as well as every organisation that is being relied on (including subcontractors being relied on) to meet the selection criteria must complete and submit responses to part 1 and the declarations in part 2. Note: The top 4 highest scoring Suppliers that pass Evaluation Stage 1 (Pre-Selection) will be taken through to Stage 2 (Final Tender).			

FINAL TENDER (STAGE 2)			
Evaluation Stage 2A: Demonstration	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Demo	The Demo evaluation contains a number of outcome specific capabilities, which Potential Suppliers must demonstrate. Response instruction details can be found in Appendix 4a under the supporting documents folder on the Atamis system.	Scored This stage will be evaluated in accordance with the criteria set out in the Final Tender Response Instructions (Appendix 4a)
Evaluation Stage 2B: Proof of Concept (PoC)	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	PoC	The PoC evaluation contains a number of outcome specific capabilities, which Potential Suppliers must demonstrate. Response instruction details can be found in Appendix 4a under the supporting documents folder on the Atamis system.	Scored
Evaluation Stage 2C: Quality Lens Questions (Quality Envelope)	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Quality Lens Questions	Contains definitions & questions that are framed from specific stakeholder perspectives or thematic viewpoints, which Potential Suppliers must demonstrate how their offering would cover these capabilities & requirements. This stage will be evaluated in accordance with the criteria set out in the Final Tender Response Instructions (Appendix 4a) document under	Scored This stage will be evaluated in accordance with the criteria set out in the Final Tender Response Instructions (Appendix 4a)

		the supporting documents folder in the Atamis System	
Evaluation Stage 2C: Pricing (Commercial Envelope)	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Evaluation Stage: Commercial - Pricing Schedule	Prices will be evaluated in accordance with criteria set out in the Final Tender Response Instructions (Appendix 4a) document under the supporting documents folder in the Atamis System	Scored This stage will be evaluated in accordance with the criteria set out in the Final Tender Response Instructions (Appendix 4a)
	The Commercial evaluation will account for 30% of the total score. All responses will be scored in accordance with the detailed guidance within the Final Tender Response Instructions (Appendix 4a) and associated Pricing Schedule (Appendix 4b)* excel document under the supporting documents folder in the Atamis System <i>* Potential Suppliers should note that the Pricing Schedule (Appendix 4b) excel document will be available at Stage 2 <u>release ONLY</u>.</i>		
Final Score	Section Reference	Evaluation Criteria	Question Scoring/Weighting (%)
	Final score	The final score is calculated by adding the total quality weighted score with the total commercial weighted score. The most advantageous tender will be the Tender with the highest final score.	The final score will be evaluated in accordance with the criteria set out in the below sub-sections.

Evaluation of Responses

Evaluation of Responses will be undertaken by a panel appointed by the Authority. Each panel member will first undertake an independent evaluation of the Responses applying the relevant evaluation criteria for each question. Then, a moderation meeting will be held at

which the evaluation panel will reach a consensus on the marking of each question.

During the consensus meeting, the decision may be taken that a Response will not be carried forward to the next evaluation stage if the consensus view is that the Tenderer has failed to meet any minimum or mandatory requirements, and/or provided a non-compliant response.

Scoring Criteria

The following scoring criteria is to be used when evaluating responses to Stage 2. A Tenderer's response will be assessed against the detailed criteria provided for each question detailed within the respective response instructions documents and be assigned a Descriptor and score from the table below:

Descriptor	Score	Definition
Very good	100	Addresses all the Authority's requirements with all the relevant supporting information set out in the Bidder Pack. There are no weaknesses and therefore the tender response gives the Authority complete confidence that all the requirements will be met to a high standard.
Good	70	Addresses all the Authority's requirements with all the relevant supporting information set out in the Bidder Pack. The response contains minor weaknesses and therefore the tender response gives the Authority confidence that all the requirements will be met to a good standard.
Moderate	50	Addresses most of the requirements with most of the relevant supporting information set out in the Bidder Pack. The response contains moderate weaknesses and therefore the tender response gives the Authority confidence that most of the requirements will be met to a suitable standard.
Weak	20	Substantially addresses the requirements but not all and provides supporting information that is of limited or no relevance or a methodology containing significant weaknesses and therefore raises concerns for the Authority that the requirement tiering may not all be met.
Unacceptable	0	No response or provides a response that gives the Authority no confidence that the requirement will be met.

Calculation Method

Technical (WT) score refers to the combined score of all subcategories under the Final Tender stage (2A + 2B + 2C).

Commercial Score (WC) refers to the score of pricing schedule responses under the Pricing sub-category of the Final Tender stage (2d).

Providing the bidder has met any mandatory criteria and minimum quality thresholds, the total weighted scores are calculated as follows:

Technical (WT)

First divide **Bidder's Technical Score** by the **Highest Technical Score**, then multiply by the **Technical weighting** to get the **Technical weighted score**.

Bidder's Total Technical Score

$$\frac{\text{Bidder's Total Technical Score}}{\text{Highest Technical Score}} \times \text{Technical Weighting} = \text{Technical weighted score}$$

Commercial (WC)

First divide **Lowest Commercial Score** by the **Bidder's Total Commercial Score**, then multiply by the **Commercial weighting** to get the **Commercial weighted score**

Lowest Commercial Score

$$\frac{\text{Lowest Commercial Score}}{\text{Bidder's Total Commercial Score}} \times \text{Commercial Weighting} = \text{Commercial weighted score}$$

Total Score (weighted) is then calculated by adding the Total Weighted Technical Score to the Total Weighted Commercial Score: **WT+WC**.

Section 5: Appendices⁴

1. Definitions

Unless the context otherwise requires, the following words and expressions used within the Bidder Pack (except for Section 3: Terms and Conditions of Contract) shall have the following meanings to be interpreted in the singular or plural as the context requires.

TERM	MEANING
“Authority”	the Department for Environment, Food and Rural Affairs acting as part of the Crown
“Bidder Pack”	this invitation to tender and all related documents published by the Authority and made available to Tenderers.
“Contract”	the contract (set out in Appendix 2) to be entered into by the Authority and the successful Tenderer.
“EIR”	the Environmental Information Regulations 2004 (as amended) together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to those Regulations.
“Atamis system”	Atamis system is the eSourcing system used by the Authority for conducting this procurement, which can be found at https://defra-family.force.com/s/Welcome .
“FOIA”	the Freedom of Information Act 2000 (as amended) and any subordinate legislation made under that Act together with any guidance and/or codes of practice issued by the Information Commissioner or any Government Department in relation to that legislation.
“Form of Tender”	means the form contained in Appendix 3 on the Atamis system in accordance with the PSQ (Atamis reference 4.32.a) to which must be signed, scanned and uploaded into the Atamis System by the Tenderer to indicate that it understands the Tender and accepts the various terms and conditions and other requirements of participating in the exercise.
“Information”	means the information contained in the Bidder Pack or sent with it, and any information which has been made available to the Tenderer by the Authority, its employees, agents or advisers in connection with the procurement.
“Involved Person”	means any person who is either working for, or acting on behalf of, the Authority in connection with this procurement and/or the Contract including, without limitation, any officer, employee, advisor, agent, member, partner or consultant”.
“Pricing Schedule”	the form accessed via Atamis system in which Tenderers are required to submit their pricing information as part of a Tender.

⁴ Potential Suppliers should not that Appendices marked with an Asterisk (*) reference documents for Tender Stage 2 release ONLY.

“Regulations”	the Procurement Act 2023 and associated regulations.
“Relevant Body	means any other organisation, body or government department that is working with or acting on behalf of the Authority in connection with this procurement and/or the Contract including, without limitation, its officers, employees, advisors, agents, members, partners or consultants.
“Response”	means the information submitted in response to the Bidder Pack via the online response forms on Atamis system including the Tenderer’s formal Tender.
“Response Instructions”	Means the document(s) containing Response Instructions for each respective stage of the tender detailed under Section 3 of the Bidder Pack Procurement Specific Requirements which must be reviewed by the Tenderer to ensure that it understands what is required for a compliant response and other requirements of participation in the exercise.
“Specification of Requirements”	the Authority’s requirements set out in Section 2 of the Bidder Pack Procurement Specific Requirements.
“Tender”	the formal offer to provide the goods or services described in section 1.1 of part 1 of the Bidder Pack and comprising the responses to the questions in the Atamis system and the Pricing Schedule.
“Tenderer”	anyone responding to the Bidder Pack and, where the context requires, includes a potential tenderer.
“Timetable”	the procurement timetable set out in Section 1 of the Bidder Pack Procurement Specific Requirements.

2. Form of Tender

For information: The Form of Tender document is located under ***Appendix 3b – (Form of Tender)*** of the ***Appendix 3 – (Pre-Selection Stage)*** folder on the Atamis system. It is to be printed, signed, scanned and uploaded into the Atamis System, as instructed within the PSQ.

3. Specification

For information: Please see ***Appendix 1a (Specification of Requirements)*** of the ***Appendix 1 (Specification)*** folder located on the Atamis system under the Bidder Supporting Documents folder.

For information: Please see ***Appendix 1b – (Requirements List)*** of the ***Appendix 1 – (Specification)*** folder located on the Atamis system under the Bidder Supporting Documents folder.

4. Conditions of Contract*

For information: Conditions of Contract are as detailed in the Award Form, Core Terms and associated schedules. Please find all Contract documents in the **Appendix 2 – (Mid-Tier Contract T&Cs) folder** located under the Supporting Documents folder on the Atamis system.

5. Selection Stage Instructions

For information: Please see **Appendix 3a – Pre-Selection (Stage 1) Response Instructions and Assessment Methodology** in the **Appendix 3 – Pre-Selection (Stage 1) folder** located under the Supporting Documents folder on the Atamis system.

6. Final Tender Stage Instructions

For information: Please see **Appendix 4a – Final Tender Response Instructions and Assessment Methodology** in the **Appendix 4 – Final Tender (Stage 2) folder** located under the Supporting Documents folder on the Atamis system.

7. Pricing Schedule*

For information: Please see in **Appendix 4b – Tender Pricing Schedule (Commercial Envelope)** in the **Appendix 4 – Final Tender (Stage 2) folder** located under the Supporting Documents folder on the Atamis system. It is to be completed and uploaded to Atamis, as per Response Instructions under Appendix 4a