**TITLE**

**FIDELITY’S ENERGY AND UTILITIES SERVICES DYNAMIC MARKET**

**Document**

Appendix 3

For Information – Example Call-Off Document

This Appendix does not need to be returned and is for information only.

**Tender Reference and Cross-References**

Refer to Invitation to Participate document

CLOSING DATE AND TIME:

As Indicated on the Invitation to Participate Document Front Page

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# SECTION 1

# Assessment Information

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| --- | --- |
| Note to Tenderers: | * Complete every section of this entire document. * Submit as a word document (.doc) or pdf document (.pdf) as preferred. * Assessments shall only be conducted on assessment questions if you successfully pass the Procurement Specific Questionnaire stage (based on the PSQ version 2 released February 2025). * These answers may be included in the final contract of the successful bidder. |

# Question Scoring

Please refer to the ITP document for full information on scoring methodology and generic worked examples.

The questions asked in this section are for 2**0%** out of a total of **25** of marks (each scored 0 to 5 – see the ITP document for further clarity) as follows

|  |  |  |  |
| --- | --- | --- | --- |
| **Question Number** | **Question Title** | **Weighting** | **Marks Available** |
| **1** | **Operational Question – How you Will Provide the Service** | **5%** | 0 to 5, marked according to the indicated table in the ITP document |
| **2** | **Mobilisation and Exit – How You Will Onboard/Mobilise and How You Will Exit/Terminate Services to Client** | **2%** | As above |
| **3\*** | **\*Green Question 1– Renewable Sources of Supply\*** | **5%** | As above |
| **4** | **Green Question 2 – Organisational Carbon Reduction** | **3%** | As above |
| **5** | **Social Value – Delivering Benefits** | **5%** | As above |

In the event of a tie, where two or more suppliers gain an equal score in a Mini-Competition or direct tender, the Question marked with \* will be used as the Key Question to determine who should win the work. In the event a further tie, the questions will be compared score to score to determine the winner in following order (including the Key Question) – Question 3, Question 1, Question 5, Question 4, Question 2. In the unlikely event of a further tie new questions may be asked to determine the winning bid.

In most instances the above marking scheme and questions will be used, but Fidelity also reserves the right to amend questions and or weighting where the Mini-Competition requires a different approach and weighting mechanism. This will be made clear at the point of Mini-Competition as to whether the Mini-Competition is relying on this Appendix 3’s model weighting and questions above, or something else specific to the call-off exercise being undertaken at that time.

Price will be marked at 80% and will be based on a specific Fidelity-derived pricing schedule produced for each Mini-Competition.

Price will only be assessed in conjunction (and in order of preference) with:

1. The answers in the Request for Quotation (totalling 20%), or, secondly,
2. The answers in this Appendix 3.

Every answer above will apply to every lot, but your answer should be tailored to reflect the Lot you are bidding or applying for under this Agreement. Your answer shall be marked in the context of which streams you are bidding for – please indicate below:

|  |  |
| --- | --- |
| **Lot** | **Indicate with an “X” if you wish to be considered for this Lot** |
| 1 – Electricity, Gas, or Water Provision Contracts |  |
| 2 – Added Services |  |

# SECTION 2

# Technical Questions

Answer the following questions:

|  |  |
| --- | --- |
| **Question 1: Operational Question**  **Weighting: 5% weighting, applied to marks out of 5** | |
| How do you intend to provide the Services (for Lots 1 and 2 or Lot 1 or 2)?  Explain to us your general approach and methodology in your answer. We need to ensure we understand from your answer how you will deliver the Service to the Client and what it consists of.  **DO NOT** refer to onboarding or exiting of service beyond explaining any prior or subsequent link affecting delivery actions, as onboarding and exiting mechanisms and approach is asked about in another question.  Note: If you are only intending to make an Application for one Lot, e.g. Lot 1, then please answer this question in the context of that one Lot. If you are applying for 2 Lots, please double the page restriction indicated and in the adjacent box, and reply per lot according to the restricted number of sides per Lot (e.g. 1 side of A4 for 2 Lots = 2 sides of A4, 1 side for Lot 1 and 1 side for Lot 2). Your answer will be assessed in the context of what you indicate in the prior part to this Section. | Responses:  (Font Arial size 10 point single line spacing and normal margins inside box provided) – limited to 2 sides\* of A4 **not** including the question box  \**a “side” is to be interpreted as one complete side of an A4 page, a page having two sides of an A4 piece of paper* |
| **ANSWER:**  [delete this and insert answer here] | |

|  |  |
| --- | --- |
| **Question 2: Mobilisation/Onboarding and Exit**  **Weighting: 2% weighting, applied to marks out of 5** | |
| How will you onboard/mobilise and how will you exit/terminate services to the client.  Explain to us your approach to onboarding and exiting mechanisms.  Note: If you are only intending to make an Application for one Lot, e.g. Lot 1, then please answer this question in the context of that one Lot. If you are applying for 2 Lots, please double the page restriction indicated and in the adjacent box, and reply per lot according to the restricted number of sides per Lot (e.g. 1 side of A4 for 2 Lots = 2 sides of A4, 1 side for Lot 1 and 1 side for Lot 2). Your answer will be assessed in the context of what you indicate in the prior part to this Section. Plans without page restriction describing milestones and steps to be taken in Gantt format do not count within the page or side restriction. Gantts must be in pdf document file for easy reading by the reviewer. | Responses:  (Font Arial size 10 point single line spacing and normal margins inside box provided) – limited to 1 sides\* of A4 **not** including the question box  \**a “side” is to be interpreted as one complete side of an A4 page, a page having two sides of an A4 piece of paper* |
| **ANSWER:**  [delete this and insert answer here] | |

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| **Question 3: Green Question 1 – Renewable Sources of Supply**  **Weighting: 5% weighting, applied to marks out of 5** | |
| Explain your “fuel mix” for the following products:  Standard Electricity –   1. Fuel mix % split. 2. CO2 Emissions per g/kwh 3. Radioactive waste – g/kwh   Renewable Energy Mix –   1. Fuel mix % split. 2. CO2 Emissions per g/kwh 3. Radioactive waste – g/kwh   Natural Gas –   1. Fuel mix % split. 2. CO2 Emissions per g/kwh   Green Gas –   1. Fuel mix % split. 2. CO2 Emissions per g/kwh   For Lot 2, please provide an explanation which may include the above information, but can also refer to the additional services you are providing.  Please outline any plans you have, to add significant renewable energy sources to your portfolio. We are particularly interested in renewable gas projects and any innovation you can add here.  Note: If you are only intending to make an Application for one Lot, e.g. Lot 1, then please answer this question in the context of that one Lot. If you are applying for 2 Lots, please double the page restriction indicated and in the adjacent box, and reply per lot according to the restricted number of sides per Lot (e.g. 1 side of A4 for 2 Lots = 2 sides of A4, 1 side for Lot 1 and 1 side for Lot 2). Your answer will be assessed in the context of what you indicate in the prior part to this Section. | Responses:  (Font Arial size 10 point single line spacing and normal margins inside box provided) – limited to 2 sides\* of A4 **not** including the question box  \**a “side” is to be interpreted as one complete side of an A4 page, a page having two sides of an A4 piece of paper* |
| **ANSWER:**  [delete this and insert answer here] | |

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| --- | --- |
| **Question 4: Green Question 2 – Organisational Carbon Reduction**  **Weighting: 3% weighting, applied to marks out of 5** | |
| How is your business seeking to reduce its own carbon footprint? Please list all activities you have undertaken within your business, in particular with reference to your practical application of any accreditations you have, either PAS or ISO or other equivalent.  Note having accreditations will provide the chance to increase your score and enable higher marks, but lack of accreditation attainment will not prevent you from receiving an average score or otherwise receiving a high score if you have an approach viewed to be equivalent or better than the relevant accreditations. For that reason, as accreditation is not a barrier to high score or average score or if you have an equivalent approach of good standing as this is a developing position as government policy advances and changes, we are not making this a suitability question but an assessed question as it is not intended to be barrier to being considered.  How does your organisation help to lower the carbon footprint of our customers?  What initiatives can you suggest or are willing to fund within our customer base?  Note: If you are only intending to make an Application for one Lot, e.g. Lot 1, then please answer this question in the context of that one Lot. If you are applying for 2 Lots, please double the page restriction indicated and in the adjacent box, and reply per lot according to the restricted number of sides per Lot (e.g. 1 side of A4 for 2 Lots = 2 sides of A4, 1 side for Lot 1 and 1 side for Lot 2). Your answer will be assessed in the context of what you indicate in the prior part to this Section. | Responses:  (Font Arial size 10 point single line spacing and normal margins inside box provided) – limited to 2 sides\* of A4 **not** including the question box  \**a “side” is to be interpreted as one complete side of an A4 page, a page having two sides of an A4 piece of paper* |
| **ANSWER:**  [delete this and insert answer here] | |

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| --- | --- |
| **Question 5: Social Value – Delivering Benefits**  **Weighting: 5% weighting, applied to marks out of 5** | |
| Explain how you will deliver benefits to our Clients through Social Value? What Social Value, in the context as outlined in the Invitation to Participate, can you deliver?  What targets could you propose for general delivery, and for inclusion in any Stage 2 Contract? Targets suggested should be SMART (Specific, Measurable, Attainable, Realistic and Time-Based).  Note: If you are only intending to make an Application for one Lot, e.g. Lot 1, then please answer this question in the context of that one Lot. If you are applying for 2 Lots, please double the page restriction indicated and in the adjacent box, and reply per lot according to the restricted number of sides per Lot (e.g. 1 side of A4 for 2 Lots = 2 sides of A4, 1 side for Lot 1 and 1 side for Lot 2). Your answer will be assessed in the context of what you indicate in the prior part to this Section. | Responses:  (Font Arial size 10 point single line spacing and normal margins inside box provided) – limited to 2 sides\* of A4 **not** including the question box  \**a “side” is to be interpreted as one complete side of an A4 page, a page having two sides of an A4 piece of paper* |
| **ANSWER:**  [delete this and insert answer here] | |