



Invitation to Tender

Evaluation of Approaches to Addressing the Nutrient Surplus in Northern Ireland

Project code: OEP024-01

July 2025

1. Introduction

- 1.1 The Office for Environmental Protection (The OEP) is a public body that protects and improves the environment by holding government and other public authorities to account. We were legally created in November 2021, under the Environment Act 2021.

Our work covers England and Northern Ireland. We also cover reserved matters across the UK (a matter on which only the UK Parliament in Westminster can make legislation).

We are an independent non-departmental public body, funded by the Department for Environment, Food and Rural Affairs (Defra) in England and the Department of Agriculture, Environment and Rural Affairs (DAERA) in Northern Ireland, who oversee our use of public money.

However, we pursue our objectives and implement our functions independently and impartially, separately from government. Our judgements are our own, formed independently.

- 1.2 This document sets out the scope and parameters of work which the OEP wishes to commission and describes how tenderers may tender to undertake this work.
- 1.3 For guidance, this tendering opportunity has an indicative budget in the range below (NB. all values include VAT):

£10- £25k	£20k- £35k	£25k- £50k	£40k- £60k	£60k- £80k	£75k- £125k	£100k- £150k	£125k- £200k	£175k- £250k	£200k- £350k	£300k- £500k
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Note that this is for the initial development work and an anticipated schedule of annual updates for three years. However, we will have a go/no-go decision point in Spring each year to determine whether the contract will or will not continue with annual updates. If we decide to cease the contract then any planned future work will not occur or be chargeable, so the indicative budget above may be lower.

2. Timetable

The target timetable for this process is as follows:

- Deadline for receipt of questions relating to this ITT 10th August 2025
- **Deadline for receipt of tender submissions** **31st August 2025**
- Notification of the OEP's decision W/C 8th September 2025
- Commencement of work 15th September 2025
- Completion of work – finalised report 15th September 2028 (on assumption that

authorisation to proceed is
achieved within each FY.)

We reserve the right to change the timetable if deemed necessary.

3. Objectives

- 3.1 To provide the OEP with a framework to monitor and evaluate government plans to reduce the nutrient surplus in Northern Ireland.
- 3.2 This objective will be achieved through review and critical appraisal of the following areas, as described further in Section 5:
 - A. Project inception, including stakeholder engagement.
 - B. Evaluation of the effectiveness of the Nutrient Action Programme in reducing the nutrient surplus and its impact on the environment.
 - C. Assessment of how other strategies and policies will impact the nutrient surplus and their effects on the environment.
 - D. Development of indicators to monitor government progress in addressing the nutrient surplus over time.
- 3.3 The **scope** of this project will focus on both nitrogen and phosphorus at the scale of the food system in Northern Ireland. We are interested in the overall national nutrient balances rather than those at farm, catchment or regional scale. For this project, we define the food system as the interconnected network of activities that link food production, processing, consumption, waste, and emissions to the environment. It will include the agriculture, wastewater, energy, and waste sectors, as well as any others that may impact the nutrient surplus. The project will evaluate scenarios of nutrient management within the food system and their impact on emissions of nitrogen and phosphorus to the air and water environment.

4. Background

- 4.1 The Office for Environmental Protection (OEP) has the mission to protect and improve the environment by holding government and other public authorities to account. Further information is detailed in our [Strategy](#)¹ and [Corporate Plan](#)².
- 4.2 To achieve our objectives, the OEP has four main functions:
 - We review and report on progress in delivering Environmental Improvement Plans (EIPs), goals, and targets.
 - We monitor and report on the implementation of environmental law.
 - We advise government on proposed changes to environmental law and other matters related to the natural environment.
 - We investigate suspected serious failures to comply with environmental law by public authorities and enforce compliance where needed.
- 4.3 The proposed area of study covered by this project will complement our wider scrutiny of EIPs, goals and targets, and will support the development of our annual monitoring reports and other functions.

¹ www.theoep.org.uk/report/our-strategy-and-enforcement-policy-2024

² www.theoep.org.uk/report/oep-corporate-plan-202526-202627

Nutrients In Northern Ireland

- 4.4 Despite numerous regulations implemented over the past three decades, nutrient enrichment remains a widespread and persistent issue in both aquatic and terrestrial ecosystems in Northern Ireland. The harmful effects of nutrients on freshwater bodies have been highlighted by the toxic algal bloom in Lough Neagh, drawing attention to extensive nutrient enrichment in lakes such as Lough Erne and Lough Melvin. Over 60% of freshwater bodies in Northern Ireland fail to achieve the 'Good' status target set by the Water Framework Directive (WFD), primarily due to phosphorus impacts. Soluble reactive phosphorus concentrations in rivers have increased from 2011 to 2024. Additionally, out of the 12 coastal areas failing to achieve 'Good' status under the WFD, 10 are failing due to elevated levels of dissolved inorganic nitrogen.
- 4.5 All Special Areas of Conservation (SACs) and Special Protection Areas (SPAs), along with 99.7% of Areas of Special Scientific Interest, are exposed to ammonia concentrations exceeding $1\mu\text{g}/\text{m}^3$, the long-term annual average critical level for lichens, mosses, and associated ecosystems. Approximately a quarter of these ecosystems are exposed to ammonia concentrations exceeding $3\mu\text{g}/\text{m}^3$. Ammonia emissions have continued to rise year on year, increasing from just over 26 kilotons in 2010 to 32 kilotons in 2021.
- 4.6 Nutrients primarily enter the environment from two sectors: agriculture and wastewater management. These sectors are composed of complex, interconnected sources that contribute nutrients across varying spatial and temporal scales.
- 4.7 Nutrients in Northern Ireland are addressed in several key directives and associated regulations, which set targets and determine actions to mitigate nutrient impacts on the environment. The Water Framework Directive (WFD) (2000/60/EC) and Habitats Directive (92/43/EEC) are the overarching regulations controlling nutrient impacts on aquatic and terrestrial environments in Northern Ireland.
- 4.8 Achieving the objectives for nutrients under the WFD relies heavily on the successful implementation of regulation such as the Nutrient Action Programme (NAP) and the Urban Wastewater treatment Directive. A consultation on proposed changes to the NAP was released for consultation in May 2025³.
- 4.9 Several recent policies and initiatives will significantly impact nutrient management, particularly on farms. For example, Future Agricultural Policy will play a key role in shaping agricultural practices in the coming years, with initiatives such as the Beef Carbon Reduction Scheme⁴ potentially impacting nutrient practices. The government has also initiated plans to address the manure surplus in agriculture through the Sustainable Utilisation of Livestock Slurry programme⁵. Additionally, the Soil Nutrient Health Scheme, will also have significant consequences for nutrient management⁶.

³ www.northernireland.gov.uk/consultations/public-consultation-proposed-nutrients-action-programme-2026-2029

⁴ www.daera-ni.gov.uk/articles/beef-carbon-reduction-scheme

⁵ www.daera-ni.gov.uk/news/daera-awards-ps4m-first-successful-sustainable-utilisation-livestock-slurry-sbri-phase-2-company

⁶ www.afbini.gov.uk/article/soil-nutrient-health-scheme

The OEP Nutrients Programme

- 4.10 Nutrient enrichment of aquatic and terrestrial ecosystems has been identified as a priority area of work for the OEP in Northern Ireland. This has been supported by analysis carried out as part of our report on the Drivers and Pressures Impacting Biodiversity in Northern Ireland⁷, which was published in October 2024. The aim of the Nutrients Programme is to protect and improve the environment by reducing nutrient impacts on aquatic and terrestrial ecosystems, holding the government accountable for the implementation of regulations and achieving targets.
- 4.11 The Nutrients Programme is being carried out in two phases. Phase 1 (2024-25) focused on delineating the problem: identifying the relevant OEP functions and determining the most effective pathways for us to have an impact. Phase 2 (2025-27) will implement actions to reduce the impact of nutrients on the environment by scrutinizing the EIP and environmental law, providing advice to the government, and/or taking enforcement actions where appropriate.
- 4.12 During Phase 1 (2024/25) we have been carrying out a number of activities on Nutrient in NI:
- Evaluation of wastewater system inputs to aquatic protected sites.
 - Review of environmental assessments regime for nutrient management.
 - Understanding regulatory divergence and its environmental impact, focusing on nutrient management.
 - Stakeholder engagement through workshops and meetings.
- 4.13 While some Phase 2 activities are still in development, to date during 2025 we have:
- Sent a letter of advice⁸ to the DAERA Minister on the Nutrient Action Programme consultation which was published at the start of May 2025⁹.
 - Commenced an environment law report scrutinising the Nutrient Action Programme 2019 regulations and their implementation. This work is due for completion in early 2026.
- 4.14 As part of the Nutrient Programme, we are looking to utilise an existing modelling tool to scrutinise government plans to address nutrient management practices and losses to the terrestrial and aquatic environment within Northern Ireland over the next few years. It is beyond the timeframe and scope of this study to develop a new model for this work and as such an existing model should be adapted and applied to address tasks outlines below. Farm or catchment scale models are unlikely to be suitable for this work unless they are appropriate for scaling up to national scale.

⁷ www.theoep.org.uk/report/drivers-and-pressures-northern-ireland

⁸ www.theoep.org.uk/report/oep-gives-advice-daera-minister-nutrients-action-programme-regulations-consultation

⁹ www.daera-ni.gov.uk/consultations/public-consultation-proposed-nutrients-action-programme-2026-2029

5. Requirements and Services

The supplier shall:

A: Project inception

- 5.1 Attend a project inception meeting to confirm the scope, project requirements, delivery approach, methodologies to be used for stakeholder engagement, document review and analysis and deliverables. We will also share an explanation of our wider work activities for context. We can hold this meeting at our office in Worcester or in Belfast, or by video conference if in-person meeting is not possible.
- 5.2 Where necessary and agreed with us, engage with key stakeholders in the delivery of this work, including but not limited to, Department of Agriculture Environment and Rural Affairs and Northern Ireland Environment Agency and Northern Ireland Environment Link. A final list of stakeholders will be agreed at the inception meeting.
- 5.3 **Tasks A-C must be delivered by March 2026 (except for the annual updates referred to in Task C), while Task D and final report will be delivered in September 2026.**

B: Baseline Model Development

- 5.4 Identify and collate the data required to carry out the work detailed in these requirements. Where data are not publicly available, the OEP will help the supplier to get access to the necessary data. Once collected, create a database including metadata related to sources, contact points, update frequency, and uncertainties.
- 5.5 Develop a robust and accurate baseline model of current nutrient management practices and losses of nitrogen and phosphorus to the environment at national scale in Northern Ireland.
Note: It is beyond the timeframe and scope of this study to develop a new model for this work and as such an existing model should be adapted and applied to address tasks.
- 5.6 Once the relevant data has been collated and the baseline model has been developed, engage with the OEP and experts in Northern Ireland to validate the assumptions, data, and uncertainties in the model. Use feedback from this process to improve the model and its outputs. Throughout this project, assumptions and uncertainties must be explicitly recorded and communicated.

C: Indicator Development

- 5.7 Using the outputs from the model and feedback from stakeholders, identify a suitable number of indicators to monitor government progress in addressing the nutrient surplus.
- 5.8 Provide annual updates of these indicators. We anticipate that this will be required for a minimum of three years from 2026, but we will need to confirm the ongoing requirement each year. We will have a go/no-go decision point in Spring each year to determine whether the contract will or will not continue with

subsequent annual updates. If we decide to cease the contract then any planned future work will not occur or be chargeable.

- 5.9 On an annual basis, provide a short report on updates made to the model, changes in the indicators, and findings of any new scenarios.

D: Scenario Analysis

- 5.10 Work with us to identify scenarios that include potential outcomes for phosphorus and nitrogen management arising from the Nutrient Action Programme, Future Agriculture Policy, Sustainable Utilisation of Livestock Slurry programme, Soil Nutrient Health Scheme and others.
- 5.11 Run the agreed scenarios and identify changes to nitrogen and phosphorus management as a result of the government's proposed actions. This will be an iterative process, with engagement with us and key stakeholders to refine scenarios where appropriate. For each final scenario, develop a narrative describing the changes in nutrient management and their impact on the nutrient balance and, where possible, emissions to the environment.
- 5.12 We may also require additional scenarios to be run concurrently with you updating the indicators. The indicators and scenarios are likely to be included in our annual progress report on the NI Environmental Improvement Plan once it is published.
- 5.13 Provide scenarios and related narratives once they are prepared at the end of Task B. Following the development of indicators in Task C, deliver a completed report as described below.

Reporting Requirements

- 5.14 Collate the findings into a formal report(s). The report must:
- Include full details of document reviews, data analysis, quality assurance and the methods used for any stakeholder engagement undertaken. In addition to a full reference list, you must provide information on the sources/databases utilised for document sources.
 - Include a non-technical summary as well as technical documents for findings and recommendations of the review work above.
 - Fully document and reference all supporting information as the project will rely strongly on published evidence and data.
 - Be provided initially in draft form on a timescale to enable us to undertake sufficient review, and for comments and amendments to be agreed with the supplier for finalising the report.
 - Be of suitable content, format and standard for publication on the OEP's website. It must provide good accessibility, with appropriate use of tables and graphics.
 - Be accurate and quality checked.
- 5.15 We welcome and encourage the publication of suitable material by the supplier in a peer reviewed journal and will consider additional resourcing to do this. Any raw data collected for the project will be retained by the OEP.

Project and team management

- 5.16 Use appropriate project management techniques to ensure that all activities are undertaken on time, on budget and to a high standard of quality; manage budget and risks robustly; and resolve issues promptly.
- 5.17 If any services or elements of the delivery are subcontracted:
- Agree each subcontractor with us in advance.
 - Manage the subcontractor's activity and performance as if they were part of your own team.
- 5.18 Provide a single point of contact of appropriate seniority with whom we will liaise on all day-to-day matters throughout the duration of the contract.
- 5.19 Maintain an oversight of all work and propose opportunities for improved coordination and efficiency where possible to reduce overall costs and improve value for money.
- 5.20 Provide regular progress reporting and attend project progress meetings as required. Every one or two weeks is proposed.

Minimising environmental impacts

- 5.21 We expect you to:
- Minimise environmental impacts wherever possible in the way you undertake this project.
 - Have an environmental management system in place that is at least equivalent to the standards required by ISO 14001¹⁰.

¹⁰ If you are a small business or micro business we only expect you to comply with this if it's reasonably practicable, but we encourage you to do so.

Note: The terms "small business" and "micro business" have the meanings given to them in s.33 of the Small Business, Enterprise and Employment Act 2015, see also HM Government guidance 'Micro-entities, small and dormant companies' (*HM Government*) <www.gov.uk/annual-accounts/microentities-small-and-dormant-companies> accessed 10/04/2024.

6. Tendering procedure

Tender submissions

- 6.1 The process the OEP uses to select its suppliers is a competitive one. You should keep your tender focussed on the specific requirements and objectives of the work, and we recommend that you also consider the assessment criteria.

- 6.2 **Tenders will only be accepted through the Panacea e-procurement portal.**

<https://app.panacea-software.com/oep>

Tenders submitted by any other route, including email, will not be accepted.

- 6.3 To constitute a compliant tender it is essential that all required information and documentation is fully completed, in the correct format, and you have submitted your tender questionnaire in Panacea by the deadline date and time. It is your responsibility to ensure this. From the deadline date and time Panacea will automatically prevent you from submitting your tender questionnaire, even if you have started adding information.

Ensure you allow sufficient time before the deadline to submit your tender questionnaire

- 6.4 Details not provided or not fully completed may constitute an admission of unsuitability/inability to fulfil requirements and may result in the tender being rejected at the OEP's absolute discretion.
- 6.5 If you do not have an existing Panacea login click on *Request a new account*. Registering on and using Panacea as a supplier to the OEP is free of charge. If you require assistance, please contact the Panacea Helpline
Email: support@panacea-software.com
Telephone: 0207 976 0116
- 6.6 For full guidance on how to use Panacea to respond to this questionnaire (i.e. to submit your tender) see: [Responding to tender questionnaires](#)¹¹.
- 6.7 We accept tenders from individuals, companies and from consortiums. Should you decide to tender as part of a consortium you will need to identify one member of the consortium (the "Lead Contractor") to act as the contracting party. All other consortium members will be sub-contractors to the Lead Contractor.
- 6.8 Your tender and all accompanying documents are to be in English.
- 6.9 All tenders will be treated on a confidential basis by the OEP and its advisers, subject to the provisions of the Freedom of Information Act 2000.
- 6.10 All tenders must remain valid for a minimum period of 90 days following the deadline for receipt.
- 6.11 Information in this ITT is offered in good faith for the guidance of interested parties, but no warranty or representation is given as to the accuracy or completeness of any of it. The OEP and its advisors shall not be liable for any

¹¹ <https://panaceaapplications.freshdesk.com/support/solutions/articles/15000024325-responding-to-tenders-questionnaires>

error, misstatement or omission. No aspect of this procedure shall constitute a contract or part of a contract. Tenderers participate in this process on the strict understanding that the procedure may be altered or that the OEP may not proceed for any reason. The OEP reserves the right not to follow up this ITT in any way and in particular not to enter into any contractual arrangement with any of the tenderers. The OEP does not bind itself to enter into negotiations or proceed with or accept any tender. Any decision to tender is at the sole discretion of the tenderer and the OEP excludes all liability in respect of any tendering costs incurred.

- 6.12 To be considered for assessment, suppliers must have sufficient and suitable insurance covers in place at the time of tendering or must include (as part of the tender submission) a commitment to take out such cover in the event of being appointed.
- 6.13 We reserve the right to reject tenders from suppliers where there are circumstances which in our reasonable opinion could impact upon the supplier's ability to deliver the services required. Such circumstances could include:
- A financial report or other financial information about a tenderer suggesting it is at risk of insolvency;
 - A tenderer is subject to relevant legal proceedings;
 - A tenderer has a conflict of interest for which there is no feasible remedy.

We would initially seek to clarify the circumstances with the tenderer.

- 6.14 We reserve the right to reject any tender if any information provided is found to be false, misleading, incomplete or inaccurate.

Enquiries about this ITT

- 6.15 If you wish to submit questions relating to this ITT please do so using the *Clarification Q&A* function in the Panacea e-procurement portal. For full guidance see: [Asking clarification questions](https://panaceaapplications.freshdesk.com/support/solutions/articles/15000037432-asking-clarification-questions)¹².
- Questions submitted in any other way will not receive a response.
- 6.16 Responses and the nature of the questions will be shared with all tenderers (unless we decide there is a specific reason not to) without disclosing the name of the tenderer who raised the question.
- 6.17 At our discretion, questions/requests for clarification on any element of this ITT or the procurement process submitted after the deadline stated in paragraph 2 will not be responded to.

Tender assessment and award of contract

- 6.18 All tenders will be assessed against the assessment criteria set out in section 8 of this ITT.
- 6.19 All tenderers will receive written notification of our decision.
- 6.20 Any contract entered into as a result of this procurement process shall be in accordance with the OEP's standard contract terms available at

¹² <https://panaceaapplications.freshdesk.com/support/solutions/articles/15000037432-asking-clarification-questions>

www.theoep.org.uk/suppliers. We will not negotiate on these terms or accept any additional terms so by submitting a tender you are accepting that our standard contract terms will apply to any contract awarded to you.

- 6.21 Following award we will issue to the successful tenderer a contract. Once signed by both parties we will issue a purchase order to instruct the commencement of the work. The successful tenderer shall not undertake any work on this contract unless and until instructed by the purchase order.
- 6.22 We reserve the right to extend the contract to include additional work within or closely related to the original scope. If additional work is required the specification and price will be agreed between us and the Supplier, the work will then be contracted by us issuing a variation to the contract and/or a variation to the purchase order or a separate purchase order(s) prior to that work commencing.
- 6.23 We also reserve the right to direct award further contracts to the successful tenderer (the Supplier) for additional services related to the subject of this project. If further contracts are required the specification and price for each will be agreed between us and the Supplier, the work will then be contracted by us issuing a contract and purchase order to instruct the work; the OEP Standard Contract Terms will apply, and we may require additional specific terms where necessary for the contract services.
- 6.24 If the successful tenderer or any sub-contractor or individual working on the contract operates through an 'intermediary' (e.g. a personal service company or a partnership) and has conditions of liability as defined at [HMRC ESM10003](#), or is a sole trader, we will undertake a determination of IR35 applicability or employment status for tax using the HMRC CEST tool. If our determination concludes that IR35 applies or the contract is employment for tax purposes, we may require an alternative contracting method so that the required tax and National Insurance Contributions can be deducted from our contract payments.
- 6.25 Tenderers taking part in this process acknowledge and accept that we may publish contract information about the winning tender (including the contract value and the name and contact details of the winning tenderer) on the OEP website and any mandatory registers (e.g. Contracts Finder and Find a Tender Service as applicable) or elsewhere, as required of Contracting Authorities by legislation, government, our funders, or in line with recognised industry good practice.

7. Please provide the following in your tender

- 7.1 Your tender shall comprise the following elements:
- Information and declaration provided in the online Panacea questionnaire
 - Written proposal
 - Tender Quotation
 - Supporting documents:
 - Quality management policy

Details about each of these are given in the sections below.

Online questionnaire

- 7.2 Fully complete the questionnaire in Panacea, providing ALL the information and documents requested.
- Enter information directly into the boxes and upload documents where directed.
 - Some boxes and documents will auto-fill. If these are incorrect then amend the information or documents in the *Data Slots* and *Document Slots* of your Panacea account.
For guidance see: [Using Data Slots](#)¹³ and [Using Document Slots](#)¹⁴.
 - Documents must be separate not as a single combined document.
 - Provide your *Tender Quotation* in Microsoft Excel format and all other documents in PDF format.
 - You are not required to submit any other information than that requested. Any information that is not specifically requested will be disregarded.
- 7.3 The declaration must be confirmed by a person in your organisation with appropriate and sufficient authority (e.g. a Director or Bid Manager).

Written proposal

- 7.4 Your written proposal should be limited to no more than **15** x A4 sides at minimum 10pt font (excl. cover page, index, executive summary and appendices). You should keep your responses focussed on the requirements and specific objectives, and we recommend you also consider the assessment criteria. Appendices shall only be used for ancillary information; any information provided in appendices which should be in the main body of the proposal may not be referred to by the assessors.
- 7.5 The assessors may not assess beyond the stated maximum number of sides, so if your submission exceeds that number, this may result in your tender being deemed non-compliant.
- 7.6 Do not provide information by linking to websites or external sources as the assessors will not refer to these.
- 7.7 Include the following in your written proposal:
- (1) Briefly describe your organisation.** You may wish to highlight relevant services you provide and outline how you are differentiated from other organisations.
 - (2) Demonstrate your understanding of the project,** what we are trying to achieve and why.
 - (3) Describe the project team that would manage and deliver the work.**
 - a) Identify your proposed key personnel and provide a short pen portrait for each.

¹³ <https://panaceaapplications.freshdesk.com/support/solutions/articles/15000047589-adding-using-organisation-data-slots-supplier-pov>

¹⁴ <https://panaceaapplications.freshdesk.com/support/solutions/articles/15000044528-adding-using-organisation-documents-slots>

As an appendix provide concise professional CVs. Do not include personal information (e.g. contact details, age, nationality etc).

- b) Demonstrate their relevant experience and expertise, supported by examples of previous similar work they have undertaken, including:
 - An understanding of, and experience in modelling, the impact of agricultural nutrient on aquatic ecosystems.
 - An understanding of policies, regulations and measures related to the nutrient management in Northern Ireland.
 - Policy and implementation analysis more broadly.
 - Providing analysis to organisations similar to the OEP.

Where you cite examples, it would be useful to include comment on how you would translate your experience of these to our project.

- c) Identify your proposed team structure and the allocation of roles and responsibilities within the project. Identify any subcontractors.

(4) Explain your approach for delivering the work. Separately address:

- a) Your approach for undertaking each of the areas of study:

A: Project Inception, including stakeholder engagement

B: Baseline Model Development

C: Indicator Development

D: Scenario Analysis

- b) The outputs you would deliver.

(5) Explain your approach for project management. Include:

- Ensuring delivery on time and to budget.
- Quality management.
- Risk management.
- Team and subcontractor management.
- Management of personal and confidential data.

(6) A project schedule of work, showing tasks and timescales.

(7) Briefly describe your approach for minimising and managing environmental impacts associated with this project.

(8) Identify any conflicts of interest which might arise if you were selected to undertake the work and, if such a conflict were to arise, an indication of how this conflict would be addressed. This is particularly important for this project considering that certain research organisations have been used by government in the work areas being assessed.

- 7.8 With regards to delivering the work, the OEP's approach to working with contractors is hands-on. Therefore, sufficient time must be included in the project to engage the OEP through regular progress meetings, technical meetings and review, and project refinement. This will be an important component of the project.

7.9 Do not state your quotation or day rates in your written proposal.

Quotation & rates schedule

7.10 You must provide your pricing by completing the template *Tender Quotation*

Tenders not using this template or which have reformatted or modified the template may be deemed non-compliant and may not be assessed. However, you may add additional lines to the tables if there are insufficient for your number of tasks or roles being proposed.

7.11 All price values must be stated **both exclusive and inclusive of VAT**, and the applicable VAT amount shown.

7.12 Provide your **quotation** by completing the template worksheet *Quotation*.

- Enter a full breakdown of your fixed price quotation showing your price for each activity/task and deliverable. This should include mobilisation and project management. If expenses (travel etc) are not included in your task costs then include an estimate as a separate cost item.

(NB: Quotations using a payment model other than fixed price will not be accepted.)

7.13 Summarise your **proposed team** by completing the template worksheet *Personnel Involvement and Rates*.

- Enter the role titles and names of the individuals you are proposing for this project, and your estimate for the percentage of the total time each role/individual will be involved in delivering this project.
- This will assist the assessors with understanding how your project team is structured and the likely allocation of resources into the project.
- Your proposed team should be described in full in your written bid.
- Also enter your day rate for each person. We require this information for reference if we consider extending the contract to include additional related work. If your tender is successful the individuals and day rates you have submitted in the Rates Schedule will form part of the contract and will apply to any further quotation we request for a contract variation.

7.14 Provide an **invoicing schedule** by completing the template worksheet *Invoicing Schedule*.

- Propose what the payment milestones would be and when. These must be linked to defined deliverables (e.g., "Completion of X").
- We cannot accept invoice milestones defined by percentage split (e.g., 20%, 40%, 40%) unless the percentages are close to the value of the milestone deliverables.
- We cannot accept milestones that make payments up front (e.g. X% on contract signing) – milestones must be in arrears for deliverables successfully completed.
- Section 2 states that an interim milestone is required around 24 March – this must be one of the payment milestones as it is close to our financial year end.

Supporting documents

- 7.15 Provide your quality management policy. This will support your description (in your written proposal) of approaches you will use to ensure quality of deliverables.

8. Assessment criteria

- 8.1 We must be satisfied that each potential Supplier has the appropriate capabilities and resources available to undertake the work to our requirements and provide the necessary services.

- 8.2 The online questionnaire required you to make statements about exclusions and corporate requirements. These will be assessed on a pass/fail basis.

Receipt of a 'Fail' may result in your tender being excluded at our complete discretion. To inform our decision we will consider any self-cleansing or mitigation you have presented, and may seek further clarification from you.

- 8.3 Your tender will be assessed using the assessment criteria below. We may use information from any part of your tender when assessing any criterion.

Criteria • <i>Sub-criteria</i>	% weighting	Maximum possible score
Your understanding of the project, what we are trying to achieve and why	10%	70
Your project team that would manage and deliver the work	20%	140
• <i>Their relevant experience and expertise</i>	15%	105
• <i>Effective team structure and allocation of roles and responsibilities</i>	5%	35
Approach and methodology (including allocation of time and resources) that will most effectively deliver the objectives, requirements and value to the OEP	45%	315
• A: Project Inception	5%	35
• B: Baseline Model Development	10%	70
• C: Indicator Development	10%	70
• D: Scenario Analysis	10%	70
• <i>The outputs you would deliver</i>	5%	35
• <i>Project and team management that ensures delivery on time, on budget and to a high quality</i>	5%	35
Working methods that minimise and manage environmental impacts in the project effectively	5%	35
Price	20%	140
	100%	700

- 8.4 Price will each be assessed relative to the lowest compliant tender using the formula:

Lowest compliant tender price / tender price x maximum score available.

The weighting for the price criterion will then be applied to result in a weighted assessment score.

- 8.5 For all other criteria each assessor will score each criterion 0 to 7 based on the scoring guide shown below. For each criterion the scores of all assessors will be averaged then the criterion weighting applied to result in a weighted assessment score.

7: Excellent	The response demonstrates a complete understanding of the work requirements and meets them in full
6: Very good	The response is relevant and very good. It is well detailed, demonstrates a very good understanding of the work and provides robust details on how the requirements will be fulfilled.
5: Good	The response demonstrates a good understanding of the work and aligns well with the requirements and there are no concerns.
4: Acceptable	The response demonstrates an acceptable understanding of the work and aligns sufficiently with the requirements and although it may raise some queries, there are no notable concerns
3: Poor	The response is partially relevant but generally poor. It addresses some elements of the work requirements but contains insufficient detail or explanation to demonstrate how the requirements will be fulfilled. Tender may be rejected
2: Very poor	The response demonstrates very limited understanding of the work and/or has a very poor alignment with the requirements and/or raises strong concerns. Tender may be rejected
1: Unacceptable	The response fails to demonstrate any real understanding of the work and/or does not align with the requirements and/or raises very strong concerns. Tender may be rejected
0: Non-compliant	The response provides insufficient information such that it is not possible to make an assessment of the suppliers' understanding of the work or demonstration of meeting the requirements. Tender may be rejected

For each tender all weighted assessment scores will be totalled to result in a total score. The assessors will convene as a panel to moderate and agree the scores, the panel's reasons for the scores, and the panel's award decision. If clarifications are required from tenderers the panel may reconvene, and may adjust scores as a result of the clarifications, before agreeing an award decision. All scores, reasons and decisions of the panel are the consensus view of the OEP. The decision to award a contract is subject to authorisation from the OEP officer with appropriate delegated authority.

- 8.6 During assessment of tenders we may request further information or evidence from the tenderers, or from other sources, to support statements made or to conduct sufficient due diligence.