Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Research and Innovation (UKRI)

Subject: Review of Research Community Practice and Funder Expectations for Research Data Management Plans

Sourcing Reference Number: PS24318

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Section 1 – About UK Shared Business Services

Putting the business into shared services

We're a leading public sector shared service centre owned by the Department for Science, Innovation and Technology (DSIT), the Department for Energy Security and Net Zero (DESNZ), the Department for Business and Trade (DBT) and UK Research and Innovation (UKRI).

As a public sector company providing services to the public sector, we have valuable insight and a deep understanding of how the sector operates. This means that our services are fit for purpose, right from the start.

We provide a range of efficient, scalable, and expert Finance, HR and Payroll, Procurement and Business IT services helping the advancement of the UK's economy and society. We are motivated by a desire to deliver high quality, efficient and reliable service to over 25,000 civil and public servants, employed by our clients.

We work closely with our stakeholders to harness the potential of our expertise, evolving technology and to realise the maximum benefit from shared services. We aim to be a trusted partner, recognised for delivering value and benefits for our owners and to support the work they do for the people of the UK.

Our dedicated teams take immense pride in their contributions, driving value for the UK economy and its taxpayers. At our core, we firmly believe in the power of partnership and expertise. By aligning with the values of our owners, we actively contribute to achieving optimal outcomes through shared services.

By 2029, we aim to be the leading UK public sector business service provider, efficiently and securely managing multiple technology platforms and delivering a great user experience for our customers.

Privacy Statement

At UK Shared Business Services (UKSBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UKSBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.
- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

https://www.uksbs.co.uk/use/pages/privacy.aspx

For details on how the Contracting Authority protect and process your personal data please follow the link below:

https://www.ukri.org/privacy-notice/

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Section 2 – About the Contracting Authority

UK Research and Innovation (UKRI)

Operating across the whole of the UK and with a combined budget of more than £6 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit: www.ukri.org

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Section 3 – Working with the Contracting Authority

The central digital platform: video guides and user manuals now available

Onboarding for Contracting Authorities to the Find a Tender Service started from 27 January 2025. This is being coordinated across the public sector through implementation leads and sectoral leads.

From 24 February 2025, suppliers will be able to register on the central digital platform - the new enhanced Find a Tender service.

To help prospective suppliers and other stakeholders prepare we have published video guides with accompanying PDF user manuals. These guides will give you an overview of the platform, the registration process, and the information you will be asked to provide so that when the time comes your registration will be straightforward.

You can access the videos through our dedicated TPP GOV.UK supplier page: **Transforming Public Procurement - information and guidance for suppliers**, where you will also find links to the associated user manuals.

You can also access each of the videos directly using the links below:

For suppliers: How to register your organisation and first administrator on Find a Tender in three easy steps
https://youtu.be/InjCa4swtjA

For suppliers: detailed walkthrough - how an administrator completes and updates supplier information
https://youtu.be/i4ZdbMGRqeQ

For buyers and suppliers: How to use the central digital platform (enhanced Find a Tender service) a short guide for everyone
https://youtu.be/TSfxoZoV3yI

For Contracting Authorities: an overview of the new transparency commitments and illustration of notices on enhanced Find a Tender service
https://youtu.be/AlKmv5Siltc

Please note that if you want to bid for public procurement contracts then as from the 24 February there is one place - the new Find a Tender Service - to find all public sector tenders and other notices; and that prospective suppliers must register if they want to bid for any contracts.

Bidder guidance: Where a Bidder is unsure or requires any clarification, they should check with the Central Digital Platfom Team via the help options provided

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	Uk Research and Innovation (UKRI) Polaris House North Star Avenue Swindon SN2 1FF
3.2.	Buyer	Becky Eldridge
3.3.	Buyer contact details	professionalservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity and Term	The maximum budget is £55,000.00 excluding VAT.
3.5.	Process for the submission of clarifications and Bids	**All correspondence shall be submitted within the Messaging Centre of the eSourcing Portal. Guidance on how to obtain support on using the eSourcing Portal can be found in these documents. Please note submission of a Bid to any email address including the Buyer will result in the Bid not being considered, unless formally advised to do so by UKSBS.**

Section 3 - Timescales		
3.6.	Date of posting of Tender Notice on the CDP	Monday 21st July 2025
3.7.	Latest date / time ITQ clarification questions shall be received through the eSourcing Portal	Tuesday 5th August 10:00 am
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal	Thursday 7th August 2025
3.9.	Latest date and time ITQ Bid shall be submitted through the eSourcing Portal (**the Deadline**)	Thursday 14th August 2025 10:00 am
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday 27th August 2025
3.11.	Anticipated Contract Award date and publication on the Digital Platform of the Contract Details Notice.	Wednesday 27th August 2025
3.12.	Anticipated Contract Start date	Monday 1st September 2025
3.13.	Anticipated Contract End date	Sunday 30th November 2025
3.14.	Bid Validity period required	90 Days

Section 4 – Specification

1. Introduction and background

UKRI is seeking a supplier to review current UKRI and wider research sector approaches to research data management plans (DMPs), to inform the development of its new research data policy.

Context: Developing UKRI's Research Data Policy

UKRI is developing a new, pan-UKRI research data policy. This will update and streamline UKRI's expectations and guidance for sharing and managing research data arising from UKRI-funded research, including research funded by the Research Councils, Research England, Innovate UK and cross-UKRI programmes.

UKRI published a **draft version of the policy** for consultation on 9 April 2025. This draft policy includes UKRI's proposed common expectations for research data and metadata. UKRI will be consulting on this policy between April to July 2025, including through a series of stakeholder engagements.

The final policy will be supported by supplementary guidance modules, which will set out additional requirements and guidance for some research domains and data types. It will also include expectations for sharing other research-relevant objects, including algorithms, software, code, and workflows.

UKRI will be developing and consulting on these other components over the course of 2025. It will also be reviewing its approach and guidance for data management plans and supporting data sharing costs.

The final version of UKRI's new policy and guidance will replace its current policies in 2026.

UKRI's new integrated policy aims to:

- support research data from UKRI-funded research to be findable, interoperable, and reuseable (the FAIR data principles)
- enhance the value, transparency and integrity of publicly funded research, and support UKRI's wider priorities to champion open research practices and support a healthy research culture
- provide clearer, consistent expectations across UKRI's council-specific and cross-council funding, promoting good practice for the type of research being undertaken and data it will generate or use
- ensure that UKRI's expectations reflect current technological developments and best practice
- ensure that UKRI's expectations align better with other UKRI priorities, such as digital research infrastructure, supporting and recognising diverse skills and talent, and trusted and secure research and innovation

The new policy builds on UKRI's research councils' existing common principles and policies and the cross-sector concordat on open research, which have played an important role in supporting UK leadership in research data sharing and management

policy and practice. It will build on recommendations previously made by the [Open Research Data Task Force](#), and recent reviews undertaken by some of UKRI's councils (see [examples in UKRI's announcement](#)).

UKRI is also taking into account international initiatives to promote open research practices, including the [OECD recommendation on access to data from public funding](#).

Context: Reviewing UKRI's approach to data management plans

UKRI is reviewing its requirements and guidance relating to research data management plans (DMPs), as part of the development of its new policy. The review to be commissioned will inform this activity.

Presently, most of UKRI's research councils require a DMP to be submitted with research funding applications. The exact DMP format, requirements and usage for application peer-review varies across councils and funding opportunities, in part reflecting the current council-specific approach to research data policy and its implementation. Some councils also utilise DMPs to facilitate engagement and deposit with mandated repositories (for example NERC's Environmental Data Service and the ESRC-supported UK Data Service). UKRI also recognises researchers and organisations may also value the use of DMPs to more broadly support data sharing and management.

UKRI wants is future approach and guidance for DMPs to:

- encourage and support researchers and organisations to effectively plan for data sharing and management, including costs, in line with UKRI's new research data policy
- be as clear and consistent as possible, while accommodating the diversity of UKRI funding opportunities
- effectively support peer-review of funding applications and facilitate deposit in repositories, for example those that are mandated by UKRI (e.g. NERC's environmental data service) or via other appropriate routes, and that can potentially support monitoring
- balance incentivising good research data sharing and management with minimising unnecessary bureaucracy
- be practically implementable by UKRI and sector, including in relation to UKRI's Funding Service
- be appropriately informed by wider UK and international practice and standards
- be agile and flexible to new requirements as they emerge

Purpose of this commission

To inform the review and development of UKRI's future approach to DMPs and its wider research data policy, UKRI would like to better understand how other funders, research organisations, research communities and other stakeholders implement and use DMPs (or in some cases research output plans), both in the UK and internationally.

UKRI is seeking a supplier to review how DMPs are currently used and implemented by UKRI, those it funds and the wider research sector. The successful supplier will deliver a synthesis of current practices, issues, and good practices, and make recommendations about how UKRI could develop its future approach to DMPs to best support the implementation of its new research data policy and wider good practice.

Timing

This commission is timed to feed into the timeline, summarised above, for consulting on and finalising UKRI's new research data policy and its supplementary guidance by the end of 2025.

2. Requirement

Bids must be able to demonstrate they can deliver the objectives and deliverables set out below.

Objectives

1. Deliver a high-quality project in line with UKRI's requirements, specified timeframe and budget.
2. Review and deliver a synthesis of how DMPs are implemented and used by UKRI, researchers, research organisations and other relevant stakeholders, in relation UKRI funding applications and funded research (i.e. throughout the funding and research lifecycles). This should enhance UKRI's understanding of how its existing DMP requirements are implemented, where these work effectively, and any challenges that may need to be addressed.
3. Review and deliver a synthesis how DMPs are being implemented and used more widely by other research funders and the research and innovation community in the UK and internationally to support good data sharing and management. This should enhance UKRI's understanding of different approaches to implementing DMPs, examples of good practice and standards, and where these align and/or differ from UKRI's current approach.
4. Deliver implementable recommendations for UKRI's consideration, about how it could develop its expectations, guidance, and implementation of DMPs to support the aims and implementation of its new research data policy. These could include recommendations that needs to be delivered in partnership with others, for example research organisations and other funders.

The syntheses and recommendations should:

- consider UKRI's expectations for data sharing and management as set out in the draft UKRI research data policy (UKRI will also be able to provide the appointed team with further information on supplementary requirements and guidance in development).
- consider DMP expectations and implementation throughout the award and funding lifecycle (pre-application, application, peer-review, award, and post-funding).
- take a cross-research domain view and identify any important differences and needs in DMP implementation and practice across disciplinary domains or data types.
- provide an understanding of DMP services and infrastructures and how these are utilised to support implementation of current UKRI expectations and/or wider sector practice.
- consider UKRI's need to incentivise and support good data sharing and management, while minimising unnecessary bureaucracy and making its funding processes simpler and better.
- consider the potential role of DMPs in supporting responsible sharing and management of research data, notably in relation to legal, regulatory, ethical and

security and intellectual property considerations addressed in the draft UKRI research data policy.
- consider how the potential use of management plans in relation to sharing other research relevant objects that will be in scope of UKRI's final policy, including algorithms, software, code, and workflows.
- provide an objective view in relation to existing DMP approaches and services and consider innovative solutions.

Deliverables

1. Project inception meeting with UKRI to discuss (and if necessary, refine and finalise) the project plan and methodology.
2. Regular (at a minimum, monthly) check-in meetings with the UKRI lead(s) for this project, to update on project progress and address any issues arising.
3. Delivery of at least one stakeholder workshop with representatives from UKRI's councils and relevant teams. (Workshop to be held virtually however this could change to face to face)
4. Delivery of at least one stakeholder workshop with external experts and stakeholders (e.g. research organisations, publishers, data services). (Workshop to be held virtually however this could change to face to face)
5. Provision of a draft report and PowerPoint slide-deck, including landscape synthesis and recommendations for UKRI to review.
6. A presentation of the draft or final findings to UKRI's Research Data Policy Working Group.
7. Final report including synthesis and recommendations for UKRI, in Word format (electronic copy) and an accompanying PowerPoint slide-deck summarising the methodology, key findings and recommendations. The final report and slide deck will need to be written on the assumption that UKRI may publish them with a Creative Commons CC BY licence (or similar).

Methodology

UKRI is open to suggestions from bidders about methodology, but would expect that evidence gathering and analysis would contain at least some of the following techniques, or use alternative techniques that obtain a similar level of detail to achieve objectives of this project:

- literature review, including existing reports and recommendations regarding DMPs
- evidence syntheses
- analyses
- surveys
- case studies
- interviews / roundtables / workshops / focus groups
- iterative review with experts and the project steering group

Stakeholder Engagement

Bidders must demonstrate how they will effectively engage with relevant stakeholders to inform evidence gathering and the recommendations, within the bounds of project resources and timescales. Bidders should balance feasibility against the need to ensure sufficient coverage of stakeholder groups.

Relevant stakeholders/sources of evidence for this project may include, but not be limited to:

- Staff from UKRI's councils and teams
- Research organisations (e.g. researchers and staff responsible for supporting data management and UKRI funding applications and awards)
- Service providers (e.g. data repositories and services, DMP service providers)
- Other research funders
- Centres and communities of expertise in DMPs and data management
- Academic publishers and learned societies.

UKRI will support the appointed project team to identify specific internal and external stakeholder that it would like to be engaged as part of this project.

UKRI will also be undertaking a series of stakeholder consultation events on its draft policy over the project period, at which there may also be opportunity for the project team to participate and for UKRI to share insights gathered with the project team.

UKRI will review proposed stakeholder engagement plans with the project team, to ensure it aligns with UKRI's wider aims for stakeholder engagement to be as joined up and efficient as possible.

Engaging with DMP service providers

UKRI expects the project to include engagement with providers of DMP services and expertise that UK research organisations utilise (e.g. Digital Curation Centre / DMP online; Data Stewardship Wizard). However, to ensure objectivity, the project team must have independence from DMP service providers, and any relationships and/or engagement with DMP service providers must be handled appropriately.

3. Supplementary information on scope

Project scope

The scope of this project is restricted data management plans in relation to research data and other research-relevant digital objects, as defined in the draft UKRI research data policy.

Data sharing management in relation to personal and administrative data UKRI and other organisations hold *about* funding applications and research grants is not in scope.
The project must focus on usage, implementation and practice specifically relating to data management plans and not wider requirements and practice concerning research data sharing and management, which UKRI has already set out in its draft policy.
Proposals must include:

- Provide a detailed information on the project team who will be delivering the project
- Demonstrate in depth knowledge of the subject matter
- Provide in depth details of an appropriate approach and methodology proposed to deliver the project and its objectives
- Include a clear project plan
- Provide clear evidence of a plan to engage with a representative range of stakeholders throughout the project

- Be transparent about any conflicts of interest (perceived or actual) and demonstrate how objectivity will be maintained and managed in relation to existing DMP approaches and services
- Demonstrate how the project will consider innovative solutions

Related commissions

UKRI is commissioning a separate project on data sharing and management costs throughout the research and project lifecycle. Therefore, this project is not expected to focus on data costs beyond how DMPs may support planning for costs. UKRI will discuss and clarify any potential areas of interaction and overlap between the two commissions with the appointed suppliers at the start of the projects.

Access to UKRI data

UKRI will be able to share information about its DMP policies and processes with the appointed supplier. However, it may be unable to share (data on) DMPs that have been submitted to UKRI. However, if necessary, UKRI would work with the project team to identify ways to access examples in partnership with relevant stakeholders.

4. Timetable

An indicative timetable for the project is provided below. Bids should detail a proposed work plant for delivering the objectives and deliverables detailed under 'requirement.'

Activity/ milestone	Date
Inception meeting	(est.) w/c 01/09/25
Fortnightly check-in meetings with UKRI lead(s)	Online meetings agreed at inception meeting
Draft report shared with UKRI to review	(est.) November 2025
Final report (including supplementary methodology and summary PowerPoint slides)	(est.) November 2025
Hand over meeting	(est.) early December 2025

5. Terms and Conditions

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

6. Non-Disclosure Agreement

The successful bidder is expected to agree to the Non-Disclosure Agreement prior to the award of the Contract. The purpose of this NDA is to ensure that all confidential information shared with the supplier by UKRI will not be shared without prior written permission from UKRI. Confidential information may include (but is not limited to) data on DMPs that have been submitted to UKRI that is shared with stakeholder consent. Suppliers may process and use confidential information to inform their research but should ensure that no

identifiable details are included in the final report. All confidential information should be destroyed once the purpose for processing has ended.

Reserved rights by the Contracting Authority under this procurement

Bidders are to note that the Contracting Authority reserves the following matters as part of any award of Contract, at its sole discretion modify the contract in the following way during any such term or such extension, that has been duly and transparently provisioned and advertised. Nothing in these reserved rights remove any discretion available and afforded to the Contracting Authority under the Regulations associated with this procurement opportunity.

Section 5 – Evaluation of Bids

The Contracting Authority will consult the Debarment list for any bidder that submits a bid as part of this procurement. The Contracting Authority reserve the right to not enter into any Contract with any Bidder that has an organisation in its bid submission, that is on the Government Debarment list. Please ensure that your organisation and any other organisation you are bidding with are not on the Debarment list before submitting a bid for this procurement opportunity, by completing the information required on the CDP.

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UKSBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

Bidders are to note: The Contracting Authority reserve the right to assess any bidder's suitability at the award stage and will use information from the Governments Central Digital Platform, to complement and assist in this area of evaluation. If any bidder considered for award after the evaluation stage fails the ability to satisfy the Contracting Authorities needs in regard to suitability, then the Contracting Authority shall move to the next highest scoring bidder until such time as an award decision can be reached.

Do not exceed the page limits specified within each of the Non-Commercial criteria, any additional content provided beyond the specified page limit will not be considered or scored during the evaluation process. Where bidders include a cover page and/or annex, this will be taken into consideration within the page limit and therefore this is discouraged.

Where a Non-Commercial criterion requires an additional attachment such as an organogram or risk register bidders are to note the eSourcing Portal only permits 1 document upload per question therefore bidders must attach their response as a Zip folder.

Pass / Fail criteria		
Evaluation Envelope	**Q No.**	**Question subject**
Part 1 Qualification	PSQ_1	Organisation Name
Part 1 Qualification	PSQ_2	CDP / Unique identifier number
Part 1 Qualification	PSQ_3	Bidding status
Part 1 Qualification	PSQ_5	Debarment List
Part 1 Qualification	PSQ_30	Modern Slavery Statement
Part 2 Qualification	SEL1.2	Employment breaches / Equality
Part 2 Qualification	SEL1.4	Organisation classification
Part 2 Qualification	SEL1.5	Organisation size
Part 2 Qualification	SEL1.10	Information Security

Part 2 Qualification	SEL1.11 – 1.13	System acquisition and information security requirements
Part 2 Qualification	SEL2.12	UK General Data Protection Regulation
Part 2 Qualification	SEL2.19	Contracts with suppliers from Russia or Belarus
Part 3 Qualification	FOI1.1 – 1.2	Freedom of Information / EIR
Part 3 Qualification	AW1.1	Form of Bid
Part 3 Qualification	AW1.2	Bid validity period
Part 3 Qualification	AW1.3	Certificate of bona fide Bid
Part 3 Qualification	AW3.1	Validation Check
Part 3 Qualification	AW3.2	Conflict of Interest Declaration
Part 3 Qualification	AW3.2.1	Conflict of Interest Declaration and Supporting Information
Part 3 Qualification	AW4.1	Compliance to the Contract Terms and Conditions
Part 3 Qualification	AW4.2	Changes to Contract Terms
Part 3 Qualification	AW6.1	Compliance to the Specification
Part 3 Qualification	AW6.3	Insurance
Part 3 Qualification	CI1.1	Supplier Contract Details
Part 3 Qualification	NDA1.1	Compliance to the Non-Disclosure Agreement
Part 3 Qualification	NDA1.2	Changes to Non-Disclosure Agreement
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
-	-	Invitation to Quote response received on time within the eSourcing Portal
		In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to exclude the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.

Scoring criteria

Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings / scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	20%	20%
Technical	PROJ1.1	Understanding the Project Environment		10%
Technical	PROJ1.2	Methodology and Approach	80%	30%
Technical	PROJ1.3	Project Team and Capability to Deliver		40%

Evaluation of criteria

Non-Commercial Elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20**%**.
Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:
Score = {weighting percentage} x {bidder's score} = 20% x 60 = 12

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

Example
Evaluator 1 scored your bid as 60
Evaluator 2 scored your bid as 60
Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

Commercial Elements will be evaluated on the following criteria.

Price will be evaluated using proportionate pricing (lowest bid / bid mark). A Bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.

For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:

(Maximum marks available in this example being 12.5)

Bidder A Score = 50000/50000 x 12.5 = 12.5
Bidder B Score = 50000/80000 x 12.5 = 7.81
Bidder C Score = 50000/100000 x 12.5 = 6.25

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.

The lowest score possible is 0.

The scores achieved for the Non-Commercial and Commercial Criteria will be combined to give a Bidders total score and ranking.

Award criteria in the event of a tied place for an award decision

If as a result of the application of the aforementioned scored criteria applicable to Commercial and Non-Commercial has been undertaken and suitable consensus, moderation and due diligence (as appropriate and stated) has been undertaken and has occurred to ratify this position, then results in a tied place re more than one Bidder has attained a total score that is equal to another Bidder under this procurement procedures due process, then the Contracting Authority shall make an award decision on the basis of the Bidder who provided a bid that attained the highest score under Non Commercial criteria, as this aligns to the PA2023 and its associated regulations that are applicable to this procurement, in order to achieve the Most Advantageous Tender award decision.

For example:
Bidder A scores 12.50 for Commercial and 45.00 for Non-commercial
Bidder B scores 15.10 for Commercial and 42.40 for Non-commercial

The result is a tied place at score of 57.50 for both Bidders A&B

The Contracting Authority therefore will make an award decision based upon the Bidder who score the highest on under Non-Commercial criteria in a tied place, as per the example above being that the contract award, is made in the favour of Bidder A who is awarded the Contract(s).

This evaluation criteria will therefore not be subject to any averaging.

Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	• ITQ logged upon opening in alignment with UKSBS's procurement procedures. • Any ITQ Bid received after the closing date will be excluded unless circumstances attributed to UKSBS, the Contracting Authority or the eSourcing Portal beyond the bidders control are responsible for late submission.
Compliance check	• Check all Mandatory requirements are acceptable to the Contracting Authority. • Unacceptable Bids maybe subject to clarification by the Contracting Authority or exclusion of the Bid.
Conflicts of Interests	• The Evaluation team members will have CoI re visited by UKSBS prior to being given access to the bids received in the eSourcing Portal.
Scoring of the Bid	• Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	• The Evaluation team may possibly require written clarifications to be issued to Bidders submissions, in order to ensure the proper conduct of the evaluation.
Re - scoring of the Bid and Clarifications	• Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.
Consensus meeting	• To conduct a consensus meeting to agree the Non-Commercial evaluation scores. • To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the Bidders response

Due diligence of the Bid	• the Contracting Authority may *request the following requirements at the award decision stage of the Procurement:
	  o Submission of insurance documents from the Bidder
	  o Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder
	  o Financial Credit check for the Bidder (*usually carried out by UKSBS, not usually requested from the bidder)

Validation of unsuccessful Bidders	• To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.

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Section 6 – Evaluation Response Questionnaire

Bidders should note that the evaluation response questionnaire is located within the **eSourcing Portal.**

Guidance on how to register and use the eSourcing Portal is available at

https://beisgroup.ukp.app.jaggaer.com/

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

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Section 7 – General Information

What makes a good bid – some simple do's ☺

DO:

7.1   Do comply with Procurement document instructions. Any Failure to do so may lead to your bid being deemed as non-compliant and or being excluded.

7.2   Do provide the Bid on time, and in the required format. Remember that the date / time given for a response is the last date that it can be accepted; we are legally bound to exclude late submissions. Responses received after the date indicated in the Section 3 of the ITQ shall be excluded by the Contracting Authority, unless the Bidder can justify that the reason for the delay is solely attributable to the Contracting Authority

7.3   Do ensure you have read all the training materials to utilise the eSourcing Portal prior to responding to this Bid. If you send your Bid by email or post it will be excluded.

7.4   Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may exclude your Bid.

7.5   Do ensure you utilise the eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution. Ensure that you raise all clarifications before the closing date and time for receipt of clarifications, as we will be unable to respond after this time date and time.

7.6   Do answer the question in full, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.

7.7   Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs. Do ensure that you allow a sufficiency of time to register on the Digital Platform and Contracting Authorities eSourcing Portal and allow a sufficiency of time to answer all the questions, don't leave this till the last moment and miss the date and time to submit, as the Contracting Authority wishes to generate as much competition that benefits the public purse.

7.8   Do reference your document's correctly, specifically where supporting documentation is requested e.g. referencing the question(s) they apply to.

7.9   Do provide clear, concise and ideally generic contact details, telephone numbers, e-mails.

7.10   Do complete all questions in full in the evaluation response questionnaire or we may exclude your Bid.

7.11   Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to exclude any full or part responses that are not in English.

7.12   Do check and recheck your Bid before uploading this to the eSourcing Portal and ensure that your bid has been uploaded complete and correctly including your completion of the information required on the Digital Platform.

7.13   Do ensure that you advise in your bid submission if you are either
i) under investigation in regard to Debarment
ii) appealing a decision of Debarment.

7.14   Do ensure that you allow a sufficiency of time to answer all the questions, don't leave this till the last moment and miss the date and time to submit, as the Contracting Authority wishes to generate as much competition that benefits the public purse

What makes a good bid – some simple do not's ☹

DO NOT

7.13   Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.

7.14   Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.

7.15   Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission especially if a non-disclosure contract condition is incorporated and imposed within the procedure.

7.16   Do not seek to influence the procurement process by requesting meetings or contacting UKSBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.

7.17   Do not contact any UKSBS staff or the Contracting Authority staff without the Buyers written permission or we may exclude your Bid.

7.18   Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will exclude your Bid.

7.19   Do not offer UKSBS or the Contracting Authority staff any inducement or we will exclude your Bid.

7.20   Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed. unless requested to do so under a formal clarification by the Contracting Authority via the eSourcing Portal.

7.21   Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.

7.22   Do not exceed page and or word limits, the additional pages and or text will not be considered.

7.23   Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be excluded.

7.24   Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via the eSourcing Portal. Responses received by any other method than requested will be excluded.

7.25   Do ensure that your organisation or any other party that you are intending to submit a joint or sub contractual basis / bid submission with, is not on the Government Debarment list that will not be acceptable to the Contracting Authority.

7.26 Do not bid on the basis of not providing all the information that has been requested by the Contracting Authority by the closing date and time. If you are unsure or require clarity, please use the formal clarification option available to all bidders via the eSourcing Portal.

Some additional bidder guidance

8.01 All enquiries with respect to access to the eSourcing Portal and problems with functionality within the portal must be submitted to eSourcing Helpdesk
Phone 08000 698 632
Email customersupport@jaggaer.com

Please note; the eSourcing Portal is a free self-registration portal. Bidders can complete the online registration at the following link:
https://beisgroup.ukp.app.jaggaer.com/

8.02 All enquiries with respect to access to the Digital Platform portal and problems with functionality within the portal must be submitted to Digital Platform Team / Helpdesk. Please note; the Digital Platform is a free self-registration portal. Bidders can complete the online registration at the following link: https://www.find-tender.service.gov.uk/

8.03 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing Portal. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.

8.04 Question numbering is not always sequential and all questions which require submission are included in the procurement documents in excess of the CDP.

8.05 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.

8.06 We do not guarantee to award any Contract as a result of this procurement

8.07 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.

8.08 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the eSourcing Portal.

8.09 If you are a SPV, Consortium, Partnership you must provide details of the organisational structure and complete details, as required within the CDP.

8.10 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be excluded.

8.11 By submitting a response to this ITQ Bidders are agreeing that their Bid and any Contract may be made public via an FOI request suitably redacted by the Contracting Authority.

8.12 Your bid will be valid for 90 days or your Bid will be excluded.

8.13   Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may exclude your Bid.

8.14   We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.

8.15   If you fail mandatory pass / fail criteria this may result in the exclusion of your bid dependent upon the specific question and or circumstances.

8.16   Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the eSourcing Portal.

8.17   Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks e.g. a financial check on the winning bidder(s) bid(s), the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder and award it to the next highest scoring bidder.

8.18   All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the eSourcing Portal.

8.19   All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

8.20   The Government revised its Government Security Classifications (GSC) classification scheme on the 5th of August 2024 to replace the previous Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

https://www.gov.uk/government/publications/government-security-classifications

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any

instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

9. The Contracting Authority's Contact Details

9.1 Unless stated otherwise in these Instructions or in writing from UKSBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this procurement must be directed through the eSourcing Portal to the designated UKSBS contact. Any and all communications and information attained outside of the eSourcing Portal shall have no legal standing nor worth and should not be relied upon in submitting your bid response.

9.2 Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Bid response outside of the eSourcing Portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all bidders as to how to submit your Response. Failure to follow this requirement will result in exclusion of your Bid.

USEFUL INFORMATION LINKS

- https://www.find-tender.service.gov.uk/
- Equalities Act introduction
- Bribery Act introduction
- Freedom of information Act

10. Freedom of information

10.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UKSBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.

10.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question.

10.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.

10.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UKSBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.

10.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UKSBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this ITQ Bidders are agreeing that their participation and contents of their Response may be made public.

11. Timescales

11.1 Section 3 of the ITQ sets out the proposed procurement timetable. The Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

12. The Contracting Authority's Contact Details

12.1 Unless stated otherwise in these Instructions or in writing from UKSBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this procurement must be directed through the eSourcing Portal tool to the designated UKSBS contact.

12.2 Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Response outside of the eSourcing Portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all bidders as to how to submit your Response. Failure to follow this requirement will result in the exclusion of your Bid.

Appendix A – Glossary of Terms

TERM	MEANING
"Bid", "Response", "Submitted Bid ", or "ITQ Response"	means the Bidders formal offer in response to this Invitation to Quote
"Bidder(s)"	means the organisation(s) being invited to respond to this Invitation to Quote
"Buyer"	means the person in UKSBS who is responsible for conducting the procurement for and on behalf of the Contracting Authority.
"Central Digital Platform or CDP"	means the Goverments Central Digital platform were this procurement is being conducted all potential bidders must register on prior to registering an interest in a procurement opportunity and ultimately to provide a bid submission via to the Contracting Authorities e-sourcing platform. https://www.find-tender.service.gov.uk/
"Central Purchasing Body"	means a duly constituted public sector organisation which procures Goods and or Services / Works for and on behalf of Contracting Authorities
"Conditions of Bid"	means the terms and conditions set out in this ITQ relating to the submission of a Bid
"Contract"	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
"Contracting Bodies"	means the Contracting Authority and any other Contracting Authorities if and as described in the Digital Platform.
"Contracting Authority"	Means a public body regulated under the Public Procurement Regulations as applicable to this procurement, for and or on whose behalf the procurement is being run by UKSBS unless this is for UKSBS.
"Contracting Bodies"	means the Contracting Authority and any other contracting authorities described in the CDP, Procurement documents and Notice
"Customer"	means the legal entity (or entities) for which any Contract agreed will be made accessible to, in excess of the Contracting Authority.
"Debarment"	means the mechanism under which a Minister of the Crown can put any supplier on the centrally published debarment list. This must be following an investigation, whereby the minister is satisfied that a supplier is an excluded supplier or an excludable supplier and should be added to the debarment list.
"Due Diligence Information"	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
"EIR"	mean the Environmental Information Regulations 2004 2004 (as amended from time to time) together with any guidance and / or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations

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"eSourcing Portal"	means the online system that all potential bidders must use to seek clarifications in this procurement opportunity and ultimately to provide a bid submission via.
"FoIA"	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act (as amended from time to time) together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
"Goods / Services / Works"	means any Goods and or Services or Works set out at within Section 4 Specification
"Invitation to Quote" or "ITQ"	means this Invitation to Quote documentation and all related procurement documents, published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. NOTE: This document is often referred to as an Invitation to Tender within other organisations
"Mandatory"	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
"Named Procurement person "	means the single point of contact for the Contracting Authority based in UKSBS that will be dealing with the procurement
"Order"	means an order served by any Contracting Body on the Supplier
"PA2023"	means the Procurement Act 2023 and its asscociated Statutory Instruments that apply to this procedure, e.g.the Procurement Regulations 2024.
"Procurement Documents"	Means the documentation and information that is provided to all bidders so as to provide a bid(s) against the procurement opportunity.
"PSC"	means Persons of Significant Control asscociated with your bid submission
"Reserved rights"	means as if stated within these procurement documents reserved rights of the Contracting Authority to reconfigure the service provision, purchase additional Supplier Goods and or Services.
"Supplier(s)"	means in non UKSBS terms Cabinet Office e.g. a Government PPN or a specific Departments terminology question to an organisation(s) / Bidder who is bidding for this opportunity or a supplier who is not bidding this opportunity but may be subcontracted in remoteness to this opportunity e.g. UK / Treaty suppliers. In UKSBS terms it means in all procurement oppertuntites after an award decision(s) have been reached, the Bidder(s) / organisation(s) who have been awarded the Contract(s) then become a Supplier.
"Tender exercise"	means the activities and implications surounding the procurement, in the GDPR aspects section of the procurement documents.
"UKSBS"	means UK Shared Business Services Ltd herein after referred to as UKSBS.
"Unique Identifier"	means Unique identifiers defined in regulation 8 of the Procurement Regulations 2024. In the case of a bidder, it is the unique code which is submitted to the digital platform and is recognised by that platform or, where no such code is submitted and recognised, it is the unique code which is

	allocated by that platform when the Bidder registers on that digital platform.