

Request for Proposal



Open Procedure – Request for Proposal (RFP) on behalf of **UK Research and Innovation (UKRI)**

Subject: **UKRI Policy Fellowships Training and Mentoring Programme**

Sourcing Reference Number: **CSP250477**

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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.ukpbs.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/>

Section 2 – About the Contracting Authority

UK Research and Innovation (UKRI)

About UK Research and Innovation (UKRI)

Who We Are

Launched in April 2018, UK Research and Innovation (UKRI) is a non-departmental public body sponsored by the Department for Science, Innovation and Technology (DSIT). UKRI works with the government to invest over £8 billion a year in research and innovation by partnering with academia and industry to make the impossible, possible.

Operating across the whole of the UK with a combined budget of more than £7 billion, UKRI brings together the seven Research Councils, Innovate UK and Research England.

The seven Research Councils are:

- Medical Research Council (MRC)
- Science & Technology Facilities Council (STFC)
- Engineering & Physical Sciences Research Council (EPSRC)
- Natural Environment Research Council (NERC)
- Economic & Social Research Council (ESRC)
- Biotechnology & Biological Sciences Research Council (BBSRC)
- Arts & Humanities Research Council (AHRC)

Our Mission

UKRI strives for a society powered and empowered by research and innovation, delivering economic, social, environmental, and cultural benefits for all. We aim to be a trusted partner ensuring research and innovation continues to flourish in the UK.

We work in partnership with universities, research organisations, businesses, charities, and government to create the best possible environment for research and innovation to flourish. We aim to maximise the contribution of each of our component parts, working both individually and collectively with our many partners to benefit everyone through knowledge, talent and ideas.

Our impact is measured across three key elements:

- Pushing the frontiers of human knowledge and understanding
- Delivering economic impact and social prosperity
- Creating social and cultural impact by supporting society to become enriched, healthier, more resilient and sustainable

Procurement Information

UK Shared Business Services (UKSBS) is 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).

For this tender, the Contracting Authority is UKRI. UKSBS manages UKRI's tendering process by providing comprehensive procurement services, ensuring compliance with procurement regulations.

Further Information

UKRI is an independent organisation with a strong voice for research and innovation, both to government and internationally. We are supported and challenged by an independent chair and board, and are principally funded through the Science Budget by the Department for Science, Innovation & Technology (DSIT).

For more information, please visit: · UKRI: www.ukri.org · UKSBS: www.uksbs.co.uk

Engineering and Physical Sciences Research Council (EPSRC)

EPSRC is the main funding agency for engineering and physical sciences research. Their portfolio covers a vast range of fields from healthcare technologies to structural engineering, manufacturing to mathematics, advanced materials to chemistry.

<https://epsrc.ukri.org/>

Section 3 – Working with the Contracting Authority

Bidder Guidance issued by the Cabinet Office

PSQ Explainer (for Bidders) broken into three Parts

Public procurement is governed by regulations to ensure that procurement delivers value for money, competition, transparency and integrity.

The Procurement Specific Questionnaire (PSQ) has been designed to help Contracting Authorities ensure that Bidders share the right information when participating in a procurement. This is separate from the formal tender submission (on how the bidder proposes to meet the tender requirements). The PSQ consists of three parts:

Part 1 - confirmation of core Bidder information:

Bidders participating in procurements will now be expected as a Condition of Participation to register on a central digital platform (CDP). Bidders can submit their core Bidder information and, where a procurement opportunity arises, share this information with the Contracting Authority via the CDP. It is free to use and will mean Bidders should no longer have to re-enter this information for each public procurement but simply ensure it is up to date and subsequently shared. The CDP is available at <https://www.gov.uk/find-tender>. Part 1 provides confirmation that Bidders have taken these steps.

Part 2 - additional exclusions information (see sub notes 1-3):

Procurement legislation provides for an 'exclusion regime' and a published 'debarment' list to safeguard procurement from Bidders who may pose a risk (for example, due to misconduct or poor performance). Bidders must submit their own (and their connected persons (i) exclusions information via the CDP. This includes self-declarations as to whether any exclusion grounds apply to them and, if so, details about the event or conviction and what steps have been taken to prevent such circumstances from occurring again.

As part of a procurement, Bidders will need to also share additional exclusions information for any Bidders that they are relying on to meet the procurement's conditions of participation. These could either be consortium members or key sub-contractors (but excludes any guarantors). These Bidders are 'associated persons' and their exclusions information must be shared with the Contracting Authority. We recommend this is done by ensuring that associated persons register, submit and share their information via the CDP (like the prime/main bidder).

In addition to the sub-contractors who are being relied on to meet the conditions of participation (who are associated persons), Bidders will need to share an exhaustive list of all their intended sub-contractors, which will be checked against the debarment list.

- 1) Connected persons are persons who exercise (or have a right to exercise) significant influence or control over the bidder and those over which the bidder exercises (or has the right to exercise) significant influence or control. This includes majority shareholders, directors and shadow directors, parent and subsidiary companies and predecessor companies. The majority of the exclusion grounds state that they apply to the bidder or a connected person e.g. a PSC of the bidder.

- 2) Associated persons are sub-contractors or consortium members who are being relied on by the prime/main supplier to satisfy the conditions of participation in the particular procurement. This does not include guarantors, even if they are relied on to meet conditions of participation. The main bidder may be an excluded or excludable supplier by virtue of an exclusion ground applying to an associated person (see section 57 of the PA2023). A supplier can also be an excluded or excludable supplier by virtue of an exclusion ground applying to a connected person of an associated person, for example, a director of an associated person of the bidder.
- 3) Where a bidder intends to use sub-contractors, not all of these sub-contractors will be associated persons. Only if a sub-contractor is relied on to meet conditions of participation, will they be both an associated person and an intended sub-contractor.

Part 3 - Conditions of participation:

The Contracting Authority sets conditions of participation which Bidders must satisfy in order to be awarded a public contract. They can relate to the Bidders legal and financial capacity or their technical ability.

Some of the information requested in the PSQ will be for information purposes only. Other information will be assessed by the Contracting Authority. This might include a pass or fail mechanism, or a threshold which the Bidder must meet.

Bidders should note that the Contracting Authority have legislative duties to publish certain information which relate to the Supplier in their contract award notices. This information includes, but is not limited to:

- details of the winning Supplier's associated persons
- details of the winning Supplier's connected person information
- for certain procurements over £5 million, details of unsuccessful bidders

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/lnjCa4swtjA>

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/TSfxoZoV3yl>

For Contracting Authorities: an overview of the new transparency commitments and illustration of notices on enhanced Find a Tender service

<https://youtu.be/AIKmv5Siltc>

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 Platform Team via the help options provided

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	United Kingdom Research and Innovation Polaris House North Star Avenue SN2 1FL
3.2.	Buyer	Jodene Pritchard
3.3.	Buyer contact details	FMPProcurement@uksbs.co.uk
3.4.	Maximum value of the Opportunity and Term	<p>£360,000.00 + VAT for both Lots over the full duration of the contract.</p> <p>This is broken down as follows:</p> <p>Lot 1 - Training - £210,000.00 + VAT Lot 2 – Mentoring - £150,000.00 + VAT</p> <p>For each Lot, there will be a break clause at the end of each 18 Month Cohort whilst budget is being reviewed.</p> <p>The contract for each Lot shall only proceed beyond the break clause where formally instructed by the Authority noting that UKRI</p>

		reserve the right to conclude the contract and not proceed with further cohorts at the end of each break clause.
3.5.	Process for the submission of clarifications and Bids	<p>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.</p> <p>Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered, unless formally advised to do so by UKSBS.</p>

Section 3 – Timescales

3.6.	Date of posting of Tender Notice on the CDP	Monday 8 th December 2025
3.7.	Latest date / time RFP clarification questions shall be received through the eSourcing Portal	Tuesday 6 th January 2026 11:00am
3.8.	Latest date / time RFP clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal	Wednesday 7 th January 2026
3.9.	Latest date and time for Bidder to request access to the RFP documents	Wednesday 14 th January 2026 10:00am
3.10.	Latest date and time RFP Bid shall be submitted through the eSourcing Portal (the Deadline)	Wednesday 14 th January 2026 11:00am
3.11.	Anticipated notification and issue of Bidder Assessment Summaries of proposed Contracts award decision to successful and unsuccessful Bidders.	Wednesday 28 th January 2026
3.12.	Anticipated publication of the Contract Award Notice to be published after Bidder Assessment Summaries are issued to all bidders, which will start the standstill period.	Tuesday 10 th February 2026
3.13.	Anticipated commencement of Contract	Thursday 12 th February 2026
3.14.	Completion of Contract	<p>Friday 29th March 2030</p> <p><u>BREAK CLAUSE</u></p> <p>A break clause shall apply at the end of each 18 Month Cohort.</p>

3.15.	Anticipated publication of Contract Details Notice	Within 30 Days of Contract Award
3.16.	Bid Validity period required	90 Days

Section 4 – Specification and about this Procurement

Pre-Market Engagement

Pre-Market Engagement was not carried out for this tender as this is a re-tender activity and there is a well-defined market

Introduction /Background

In April 2025, the UK Research and Innovation (UKRI) launched the 3rd UKRI Policy Fellowship funding opportunity, [UKRI Policy Fellowship 2025](#). The call is led by the Economic and Social Research Council and delivered in partnership with UKRI. It is now a cross-UKRI scheme spanning thematic disciplines. Through this funding opportunity UKRI aims to fund a cohort of approximately 42 policy fellowships hosted by a range of government departments, arms-length bodies, devolved administrations and What Works Centres. The fellows will provide research and expert advice on the host's policy priority areas and support wider knowledge exchange between government and academia. A full list of the 42 specific opportunities and host departments can be found on the funding opportunity page (see '[Additional Info](#)').

Most fellows will be early or mid-career researchers (ECR or MCR), that is an academic in a UK-based university or independent research organisation. The cohort will include a smaller number of more senior fellows, mostly linked to the What Works fellowships. The department/organisation hosting the fellow will benefit from their expertise, and connections to the wider academic community, as they look to utilise research to address pressing policy challenges. The fellow will benefit from the direct experience of working in a public policy focused environment and develop their understanding of how to effectively communicate academic research to policy makers.

Successful applicants will undertake an 18-month fellowship, which includes a 3-month inception phase where the fellow and host co-design the fellowship, a 12-month main placement where they are embedded with their host department/organisation, and a concluding 3-month knowledge exchange and impact phase.

The fellowships are a development opportunity for the participating academics. Being a policy fellow will enable them to develop skills, experience and networks that will support their current practice and future career development.

Development is also supported through the scheme's cohort approach, with fellows given the opportunity to build long term networks, share learning and support one another. Training and Mentoring support is provided as a key feature of the scheme, to support the fellows' development, facilitate shared learning and equip fellows to successfully communicate their research into policy. The Training and Mentoring support will help fellows navigate the policy environments in which they find themselves over the course of their fellowship. It will help them understand how policy making works in a UK and devolved administration context, and how to effectively communicate their research to policy makers in order to ensure that it is accessible and usable. The Training and

Mentoring will help the fellows use their research and expertise to have a positive impact on public policy. In addition to providing vital support over the course of the fellowship itself, the Training and Mentoring will also have a lasting impact, combining with the experience of the fellowship, to support the participating academics future career development.

Aims and Objectives of Policy Fellowship scheme

The core aims of the UKRI Policy Fellowship Scheme for fellows are:

- Scope and lead research-related activity with the host
- Work closely with hosts to ensure alignment of priorities and that analysis is as robust and useful as possible in driving decisions
- Provide advice and peer review to other aspects of the host's work
- Support capability building within the host organisation aligned with your area of expertise
- Strengthen engagement between government and academia through activities such as:
 - Connecting with related UKRI research portfolios, acting as a pipeline for knowledge exchange between them and hosts
 - Publishing outputs from analysis produced, subject to clearance processes
 - Knowledge exchange activities with academic institutions and other analytical and policy teams within government and intermediaries
- Supporting hosts and funders of this funding opportunity in the evaluation of the fellowship programme and improvement of future schemes

Programme delivery to date

Due to successes of the previous schemes, UKRI Policy Fellowships is now an annual funding opportunity with a growing alumnus of policy fellows. For this requirement, we will be procuring a supplier to deliver Training and Mentoring for the **next three UKRI Policy Fellowship cohorts with circa 40 fellows per cohort.**

This is the third funding opportunity under the UKRI Policy Fellowship Scheme. The [ESRC Policy Fellowships 2021](#) pilot was launched in 2021, with [22 fellows](#) being placed in 10 government host departments. The [UKRI Policy Fellowships 2023](#) launched in February 2023, built on the model and successes of the original pilot, whilst significantly expanding the scheme and embedding key lessons learned from the 2021 pilot. In the 2023 cohort, [47 fellows](#) were placed in 29 host departments.

The hosts for the 2023 call include a wide range of Whitehall departments, arms-length bodies, all three devolved administrations and 5 What Works Networks. The scheme has also expanded to involve a wider range of research disciplines, working closely with ESRC and UKRI to support an increasingly diverse range of fellowship opportunities. Future cohorts are expected to span the breadth of UKRI.

Due to high demand from the 2023 cohort for the mentoring programme, the original scope of the mentoring programme, which was for 12 fellows to receive one on one mentoring was adapted and expanded to offer three routes for participation which were tailored to the range of policy fellows' needs and experience.

Lessons Learned

The successful supplier shall be provided with details of any lessons learned from the 2023 evaluation as soon as this is published.

Overview of Training and Mentoring Programme

We are inviting bidders to set out an approach to deliver a Training and Mentoring programme for three cohorts of UKRI Policy Fellows. The programme will begin in February 2026 for the 2025 cohort of fellows.

The aim of this tender is to appoint a supplier for both Lot 1 and Lot 2 for the next three cohorts of the UKRI Policy Fellowships. The successful suppliers will ensure that participants in the UKRI Policy Fellowships 2025, 2026, 2027 cohorts have access to a comprehensive and targeted Training and Mentoring support programme. The Training and Mentoring support will increase the knowledge and skills of the fellows better equipping them to engage effectively with policy makers and use their research expertise to have a positive impact on the policy making process. The Training and Mentoring programme will support the fellows over the course of the 18-month secondment and have a lasting impact on their future career development.

The UKRI Policy Fellowships 2025 call and subsequent investment management is led by the ESRC Public Policy and Engagement team (PPE) working closely with colleagues across UKRI. The successful supplier will report to the Fellowship cohort manager who will be based in the PPE team, but also be expected to engage with, and utilise input from key partners across UKRI.

Aims and Objectives of Training and Mentoring Programme

The core aims and objectives of the training and mentoring are to:

- Prepare Fellows for the cultural transition into government
- Advance fellows in their careers
- Foster networks and cross-working
- Tailor support to different disciplines and career stages
- Create a lasting alumni legacy

To meet the aims as set out above, bidders should address the following objectives:

- Offer a series of themed and focused learning sessions spanning each individual cohort. Bidders should ensure the time commitment is manageable for fellows and provide dates and times in advance.
- The sessions should be inclusive, with at least two face-to-face meetings over the cohort. Any face-to-face sessions will be based in the UK, and the successful supplier should determine location once cohort members have been recruited, taking an inclusive approach to location and venue.
- Encourage cross-disciplinary collaboration, peer support and opportunities to strengthen relationship building.
- Actively design opportunities for fellows to build networks, identify synergies across fellowships, and support collaboration both among fellows and between host departments
- Ensure longevity of benefit to participants beyond the duration of the programme itself.

- Work closely with ESRC, providing regular (minimum monthly to start with) progress reviews via email, phone, or video conferencing in advance of and after each event/deliverable.

We welcome innovative ideas, but as a minimum the design of the training and mentoring programme must be suitable for fellows based in all areas of government; Whitehall, devolved, arms-length bodies, and What Works Networks. Provision should take account of the varied disciplinary backgrounds and prior policy engagement experience of fellows. Bidders should show how they will flex delivery to meet the needs of both experienced and less experienced fellows, while still maintaining a coherent cohort approach.

Bidders are expected to describe how the full programme will be distinctive to other training and mentoring programmes, encourage the cohort approach and how the programme will help to achieve the core aims/objectives of the programme. Therefore, bidders are asked to consider how this training and mentoring programme provision will offer additional opportunities beyond learnings that are already available.

Sessions should be structured in a such a way to facilitate and strengthen the formation of cohorts who will progress together over the course of their fellowship and should consider how the cohort will sustain links after the programme. Bidders are expected to consider how they will ensure the cohort approach is maintained and not diluted when running focused training sessions.

The Programme Offer

Lot 1 Training

Group training sessions offered to the whole cohort (circa 40 fellows) each year will enable the fellows to acquire knowledge and insights that will support their fellowships, increase impact, and support future career development.

Two sessions must be delivered in person (at a minimum) to allow for networking and encourage the cohort approach. Where bidders suggest more in person sessions, they will need to demonstrate how they have considered the impact on accessibility given that fellows are based across the UK.

The focus areas of this training programme are likely to include the following topics, but will not be limited to:

- Policy making in the UK, actors, structure, cycles, streams
- Networking and building relationships in policy
- Communication training for policy, including writing and briefing
- Supporting evidence use in government
- Knowledge Exchange (KE) and science for policy in UK and international
- Equality Diversity Inclusion (EDI) in KE
- Wellbeing and mental health considerations during a fellowship
- Developing effective impact case studies and using impact to support career progression
- Data; Access, Use, Ethics and AI

The training provider should demonstrate how the designed programme has been tailored to the phases of the fellowship. The provider will design and deliver sessions as well as

coordinate with other parties delivering training, such as government bodies (e.g. [POST](#), [GoS](#), etc.) and UKRI investments (e.g. [UKRI Policy Fellowship Alumni](#), [ECO](#), [METIUS](#)). The training should be designed to support fellows during their fellowship in central and devolved government roles, and What Works Evidence Networks, and help develop policy engagement skills that will support their future career development.

Training should take place as a combination of in person and virtual.

Activities should be context-driven and offer experiential learning opportunities through a variety of interactive formats and session types.

Lot 2 Mentoring

In addition to complementing the areas of focus covered by the training programme, the mentoring programme could focus on (but not be limited to) the following activities:

- Identifying and building on fellows' unique strengths and experiences
- Creating and implementing individual development plans
- Identifying potential career pathways
- Agreeing individual outcomes and personal milestones
- Supporting fellows to grow relevant contacts and networks
- Develop specific plans for communicating their research effectively to policy audiences

Mentoring will support and compliment the training programme (see above), accelerating the personal and professional development of mentees, providing tailored support to increasing their impact during the fellowship, but also informing their future career development. UKRI has strong ambitions for participants in its fellowship schemes and sees effective mentoring to support academics for key leadership roles in public policy e.g. chief scientific advisors.

The mentoring provided is expected to draw from the full range of expertise and experience of key stakeholders (e.g. Parliamentary Office of Science and Technology, Government Office for Science, academic networks and ESRC/UKRI investments with expertise in Knowledge Exchange, policy engagement and evidence synthesis) and other relevant experts. Mentoring support will be tailored to meet the specific requirements of each individual fellow.

UKRI is looking for bidders to offer some form of mentoring opportunities to all fellows and to suggest processes to select mentees to appropriate mentors. We would like bidders to suggest the number of hours / sessions / formats that they feel would be suitable for the mentoring program noting that some form of the mentoring opportunity should be accessible to all UKRI Policy Fellows.

Potential combinations

Single bidders are welcome to submit proposals to deliver both lots (Training and Mentoring), or to submit proposals for just Lot 1 (Training) or Lot 2 (Mentoring). Bids are also welcome from consortia to provide either or both Lots, all bids will be scored on their own merit per lot. Bidders are to note that if the Training and Mentoring lots are awarded to separate Suppliers, the respective successful suppliers will be expected to collaborate with

one another in the delivery of these activities. Bidders will be expected to articulate how they plan to work with other providers to ensure that the Training and Mentoring elements of the cohort programmes are delivered in a coordinated and effective way.

Specific Requirements to both Training and Mentoring

Specific Requirements

Bidders must provide a detailed forward plan of all proposed activities for the programme and outline the programme content. Detailed plans should also include how the programme meets objectives 1-5 as stated above, details of how it will be evaluated, and an overview of the resources and expertise within the team.

Bidders are encouraged to suggest additional and / or alternative innovative activities and provide a rationale for their inclusion. Bidders are encouraged to think innovatively in terms of how they propose to address the aims/objectives, and how committing to the full programme of activities will be attractive and valuable beyond those activities.

Please note, the ESRC Policy Fellowship team will hold an induction event for the 2025 cohort of Policy Fellows on 10th February 2025. If the contract is in place we would like a representative from both the Training programme and Mentoring programme to dial in virtually to introduce themselves and the programme to the fellows. If this is not possible ESRC will hold a virtual meeting prior to the first training session for fellows to be introduced to the successful suppliers. For future cohorts it is expected that representatives from each of the successful suppliers will attend and present the planned programme of activities to the cohort at an in-person induction.

Within their proposal, Bidders should address the following;

1. *Programme content*

- Details of all activities and events within the proposed programme and how this is appropriate for the appropriate cohort of UKRI Policy Fellows
- How the programme meets the aims and objectives above

2. *Equality, Diversity, and Inclusion (EDI) and Ethical Plans*

- All sessions should be run in an inclusive and accessible way. There should be clear evidence of mechanisms to enable all programme activities to be inclusive and supportive of the full diversity of fellows to participate, and there should be evidence of appropriate monitoring to ensure proposed plans are effective.
- Evidence of the quality of plans to ensure any associated ethical issues are identified and addressed, including any responsible innovation and governance issues EDI of fellows and delivery programme.
- An Equality Impact Assessment indicating that potential impacts of the Programme have been considered and a clear plan by which to ensure UKRI Policy Fellows are linked to and inspired by a diverse range of people from a variety of backgrounds and experiences as a result of the activities
- Evidence of the quality of plans to ensure any associated ethical issues are identified and addressed, including any responsible innovation and governance issues

3. Bidder's Ability to Deliver the Proposed Programme

- Bidders will be expected to demonstrate that they have the necessary expertise to undertake this project, explicitly linking how the skills of the project team will enable the successful delivery of their proposed approach and that the appointed team has the competencies required to effectively deliver the project.
- Bidders must be able to demonstrate their understanding of researcher/academic development within the social sciences and must be able to demonstrate expertise in design and delivery of professional development programmes of this kind. We recognise consortium bids can enable bidders to compile teams with the breadth of expertise required.
- Bidders will be asked to demonstrate that enough time has been committed by individuals in the team to deliver the programme of work proposed. Roles, responsibilities, and time commitments of team members need to be set out clearly in bids.
- Presence of an appropriate balance of skills in the project team and representative diversity and disciplinary spread should also be demonstrated

4. Management and Resources

- An effective management structure that has appropriate expertise and plans in place to deliver and manage the contract
- The appropriateness and justification of the requested resources, including timelines, and the value for money represented through the programme, including any leveraged funds (if applicable)
- Assurance that all key personnel will commit the amount of time to the contract as identified in the proposal and costing, with a description of how any necessary changes in staff will be managed to maintain the quality of delivery

5. Monitoring and Evaluation

On-going evaluation will need to be a key factor to inform future plans and development activities; and to measure the success of this programme. Success indicators for the training programme will include: an enhanced and strengthened understanding of government, collaborations and networks outside of own institutions/disciplines, engagement and retention for the training, whether the fellows found the learnings useful and applicable for their fellowship.

Success indicators for the mentoring programme will include; appropriate sourcing and appointment of mentors specific to the fellows requirements, satisfaction ratings from fellows and mentors, engagement and retention, whether the fellows developed new skills to engage with policy makers or progress their career.

UKRI will survey hosts 2-3 times during each cohort, and therefore the successful supplier would need to liaise with UKRI to ensure suitable questions are included within the survey. It would also be expected that the successful supplier undertakes their own feedback collection.

Therefore, the programme must include evaluation time, and ESRC will work with the successful supplier to consider how the programme will be evaluated to complement the

information arising from the previous 2 cohorts. We expect the successful provider/s to collect baseline data for the evaluation. The aim of the evaluation will be to reflect on and evaluate where the programme has satisfactorily met all required deliverables, aims and objectives; and to consider any lessons learned which will inform future opportunities.

A detailed forward plan of all proposed activities for the programme, and how the Bidder will evaluate and measure the success of the development programme, noting the objectives and upon completion of supported activities, information provided to the ESRC should include details of all those who benefited from the activity, the immediate impacts and expected long term impacts of the programme.

Invoicing and Payment

Lot 1

Payment will only be made following satisfactory delivery of pre-agreed deliverables.

Payment will be made in 2 milestones per cohort:

Payment	Deliverable	Percentage of Payment
1	Completion of 50% training sessions	50.00%
2	Completion of 100% training sessions and deliverables received by ESRC	50.00%

Before payment can be considered, each invoice must include a detailed elemental breakdown of services completed and the associated costs.

Lot 2

It is the intention for invoices to be submitted on a time charge basis at the end of each quarter verifying the services carried out to date.

Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

Contract Term

The Contracts for both Lot 1 and Lot 2 will start in February 2026.

The Contract durations shall be for a period of 18 Months per Cohort, and a Break clause will apply upon the completion of each whilst the Authority obtains budgetary approval to proceed with the next cohort.

Each cohort will include participants in the UKRI Policy Fellowships:

2025
2026
2027

For absolute clarity the Authority reserves the right to conclude either contract after completion of each Cohort and continuation with the next cohort shall be subject to written approval from the Authority to proceed.

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. The Contracting Authority will not accept any variation to any accepted terms and conditions by any Bidder once the closing date and time for clarifications and the closing date and time for bid submissions has passed. Any failure to rescind modified terms and conditions sent in, will result in the award decision reverting to the second placed Bidder(s) and the original award decision reversed, with the original Bidder award decision bid being excluded from consideration on grounds of false statements made in the bid received, resulting in a non-compliant bid having failed a Mandatory pass / Fail question.

Debarment

The Contracting Authority will consult the Governments Debarment list in regard to its relevance to your bid(s) submission, under the procurement Regulations that apply to this procurement. This consultation may result in your bid submission failing to be considered further and your bid(s) being excluded from further consideration under this procurement, dependent upon the nature of the Contracting Authorities findings. By participating in this procurement opportunity and submitting a bid submission, all Bidders who are successful in being awarded a contract(s) agree that they shall be naturally obliged during the award stage, prior to contract signature, to advise the Contracting Authority immediately if any circumstances surrounding the award decision change, in consideration of this requirement.

Conflicts of Interest (Col)

The Contracting Authority and UKSBS take the matter of Col very seriously as part of its procurement due process life cycle, not only its own staff and third parties associated with this procurement, but also with those Bidders competing. The Contracting Authority will manage and monitor Col throughout this procurement lifecycle, so as due process is compliantly undertaken and will address and suitably manage any Col, as and when these are identified.

Capability and Capacity to undertake the procurement

The Contracting Authority will only allocate suitably qualified and experienced staff to undertake this procurement, based upon the complexity and the value of this procurement opportunity. All procurements follow standard operating procedures and policies as well as peer and line manager reviews (as applicable) as part of the procurement lifecycle.

Bid submissions and interfaces between the CDP and E-Sourcing platform (unique identifier information)

The Contracting Authority require all Bidders (and as applicable other parts of the Bidders organisation see Bidder guidance) who wish to be considered for this opportunity to have registered on the CDP, so as the Contracting Authority can utilise the unique identification number and the content that is required by the Contracting Authority to undertake its evaluation of all bids received. This not only treats all Bidders equally but also aligns to the Governments “tell us once” approach so as to reduce the burden on Bidders in regard to each opportunity that arises. If the CDP is down and would prevent any Bidder from uploading its information in good time before the closing date and time for receipt of bids and the CDP cannot guarantee that this will be functional before the closing time and date, then the Contracting Authority will provide the necessary documentation to the Bidder upon request so as these can be received either via the E-sourcing platform as an attachment or an alternative email based way of submission. Please ensure that you contact the Contracting Authority immediately if this situation arises, if the CDP is anticipated to impact on your ability to make a submission and please do ensure that you allow the Contracting Authority a sufficiency of time to be able to provision this information. Please note that the Contracting Authority will be unable to accept any submission in regard to this area, that is provided for reasons other than is clearly stated above.

Section 5 – Evaluation model

5.1. Introduction

- 5.1.1. The evaluation process will be conducted to ensure that Bids are evaluated fairly to ascertain which Bidders can demonstrate the required legal and financial capacity and the technical skills and if appropriate, experience to ensure the successful performance of the Contract.
- 5.1.2. The evaluation team may comprise staff from UKSBS and the Contracting Authority, and any specific external stakeholders or third parties that the Contracting Authority deem required.

5.2. Evaluation of Bids

- 5.2.1 Evaluation of Bids shall be based on a Conditions of Participation questionnaire held by self-certified Bidder inputs on the CDP as well as within this procurement documentation including additional questionnaire questions (as applicable) plus the Award criteria as clearly defined in the e-sourcing tool and procurement documentation.

Bidders should note that the responsibility of the accuracy of any bid submission and associated information that is presented to the Contracting Authority, as part of the Conditions of Participation questionnaire via the CDP and as submitted against specific questions, relevant and proportionate to the procurement documentation via the eSourcing Portal including Award based submissions, shall remain the sole responsibility of the Bidder(s) to ensure that this reflects and satisfies the requirements of the procurement documentation, when received by the Contracting Authority in order to carry out the due process of evaluation. For absolute clarity should a failing by any Bidder be as result of the information being incorrect, incomplete, inaccurate, false and or misleading as received after the closing date and time, then the Contracting Authority shall be under no obligation to clarify this, and this may result in any Bidder being excluded from any award under this procurement opportunity dependent upon the specific subject matter.

- 5.2.2 If the Contracting Authority find that any Bidders proposed bid that has a reliance on other parties being a Connected or an Associated Person that results in a failed condition of bidding this opportunity, then the following conditions of participation will apply as part of the proper conduct of the procurement and is accepted by a condition of bidding this procurement opportunity by any and all bidders:

(1) if the bidder has proposed a connected person e.g. director, shadow director, persons with significant control, or the right to exercise significant control over the bidder and they are on the debarment list or fail a mandatory exclusion ground then the bidder will be considered by the Contracting Authority to understand if the grounds define the bid submission to be excludable. If the grounds are considered and deemed to be unacceptable to the Contracting Authority, this will result in the bid submission being excluded and will be formally advised as such. For clarity the Contracting Authority is under no regulatory obligation, to permit any bidder to provide a replacement connected person before exclusion.

(2) if the bidder has proposed a connected person e.g. director, shadow director, persons with significant control, or the right to exercise significant control over the

bidder and they are found to be failing a discretionary exclusion ground, then the Contracting Authority will review, bone fide evidence in regard to self-cleaning, dependent upon the grounds identified. If the grounds for self-cleaning are not to the absolute satisfaction of the Contracting Authority provided within 7 Days from a formal request to do so, and that circumstances giving rise to the exclusion ground are continuing or likely to occur again, and any remoteness tests are inadequate then this will result in exclusion from this procurement opportunity. For clarity the Contracting Authority is under no regulatory obligation, to permit any bidder to provide a replacement connected person before exclusion.

Note: A bidder may be considered as an excluded or excludable bidder by virtue of a connected person of a subcontractor.

(3) if the bidder has proposed an associated person or subcontractor and they are on the debarment list or fail a mandatory exclusion ground, then the bidder will be required to provide an alternative, this replacement must be provided within 10 days from a formal request to do so via the Contracting Authority. If any bidder fails to provide an alternative, cannot provide a replacement or refuses to provide a replacement, or provides anything other than has been advised above, then this will result in exclusion from this procurement opportunity. Bidders will only be permitted to provide a replacement once.

(4) if the bidder has proposed an associated person or subcontractor and they are found to be failing a discretionary exclusion ground, then the Contracting Authority will require the bidder to provide bone fide evidence in regard to self-cleaning, dependent upon the grounds identified. If the grounds for self-cleaning are not to the absolute satisfaction of the Contracting Authority provided within 7 days from a formal request to do so, then this will result in exclusion from this procurement opportunity, if the bidder does not provide when requested to do so, a replacement above in (3). If any replacement is found to also fail any excludable grounds, then the bidder shall be excluded.

if the associated person or subcontractor above in (3) is requested by the Contracting Authority to be replaced, will then be subject to the specific non-commercial criteria, as was clearly articulated within the evaluation criteria within these procurement documents. **Note:** The Contracting Authority will not permit any changes or revisions to the original bid submission, other than to reflect the replacement associated person or subcontractor aspect, under no circumstances shall this effect or modify the original commercial price that was provided in the original submission.

Any Bidder failing to provide evidence of bone fide self-cleaning to the absolute satisfaction of the Contracting Authority within the above reasonable and proportionate time set, including any replacements by the Contracting Authority, will result in a bid submission failing to be considered further and your bid(s) being excluded from further consideration under this procurement.

- 5.2.3 The Contracting Authority hereby reserve the right regulatory 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.

5.3. CONDITIONS OF PARTICIPATION QUESTIONNAIRE

- 5.3.1. The Conditions of Participation Questionnaire shall be marked against the following Conditions of Participation pass / fail and scoring criteria.

In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, that cannot be regulatorily rectified e.g. a subcontractor being replaced, or not providing to the absolute discretion of the Contracting Authority any bone fide evidence in regards to self-cleaning, that any Bidder provided in its bid or potentially under formal clarification, then the Contracting Authority reserves the right to exclude the Bidder from further consideration and will only provide an assessment summary to the extent that the tender was assessed against the criteria before it was identified as failing to meet this requirement. The Contracting Authority will not be providing full assessment summaries in these instances but will discharge the balance of its regulatory obligations under this procurement opportunity.

Conditions of Participation Pass/fail criteria via the Central Government Digital Platform (CDP)		
Evaluation Envelope	Q No.	Question subject
Procurement Specific Questionnaire: Potential Supplier Information		
Qualification Questionnaire Part 2: Exclusion Grounds		
Part 1, 2 and 3	CDP	Main Bidder details / Consortia / SPV / Partnerships / PSC / Subcontractors / Associated and Connected persons that create the organisational make-up of the Bidder Mandatory and Discretionary grounds for exclusion and debarment information as provided within the Central Governments Digital Platform (CDP).
Qualification Questionnaire Part 3: Conditions of Participation Questions (General and Project Specific via the eSourcing Platform)		
Part 1	PSQ_1	Organisation Name
Part 1	PSQ_2	CDP / Unique identifier number
Part 1	PSQ_3	Bidding status
Part 1	PSQ_5	Debarment List
Part 1	PSQ_6	CDP Download Submission
Part 2A	PSQ_7	Associated Persons Conditions of Participation Reliance
Part 2B	PSQ_11	List of Intended Sub-Contractors
Part 3A	PSQ_13	Financial Capacity Conditions of Participation
Part 3A	PSQ_14	Supplier Guarantor
Part 3A	PSQ_15	Insurance
Part 3A	PSQ_15.1	Insurance in Place
Part 3A	PSQ_17	Data Protection
Part 3A	PSQ_18	Relevant experience and contract examples
Part 3A	PSQ_19	Experience of sub-Contractor management
Part 3A	PSQ_21	Health and Safety
Part 3B	PSQ_30	Modern Slavery Statement

Part 3B	PSQ_32	Confirmations
Part 4	SEL1.10	Information Security
Part 4	SEL2.12	UK General Data Protection Regulation
Part 4	SEL2.19	Contracts with suppliers from Russia or Belarus
Part 4	SEL2.20	Non-UK or Non-Treaty state suppliers and subcontracting arrangements
Part 4	SEL2.21	Subcontracting UK or Treaty based suppliers
Part 4	FOI1.1 – 1.2	Freedom of Information / EIR / Supplier Assessment Summaries
Part 4	DEC1.1	Declaration
	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 the any of the Conditions of Participation questionnaire stage scoring methodology, nor the Award stage scoring methodology or Mandatory Pass / Fail criteria.	

- 5.3.2. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.
- 5.3.3. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.3.4. Questions marked 'for information only' do not contribute to the scoring model.
- 5.3.5. During the evaluation stage, only Bidders who achieve a Pass for all the Mandatory and Discretionary requirements of the Conditions of Participation questionnaire e.g. Excluded or Excludable and PSC (notwithstanding any Debarment status) within the RFP as well as procurement specific questions, will be considered for a contract award. A failure to meet the Conditions of Participation questionnaire requirements depending upon the nature and any such available resolution of the failure, may result in exclusion from the procurement opportunity.

5.4. AWARD questionnaire

- 5.4.1. The award questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.

Award Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Part 5	AW1.1	Form of Bid
Part 5	AW1.2	Bid validity period
Part 5	AW1.3	Certificate of bona fide Bid
Part 5	AW3.2	Conflict of Interest Declaration
Part 5	AW3.2.1	Conflict of Interest Declaration and Supporting Information
Part 5	AW4.1	Compliance to the Contract Terms and Conditions
Part 5	AW4.2	Changes to Contract Terms
Part 5	AW6.1	Compliance to Specification

Technical	AI1.1	Artificial Intelligence
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Commercial	AW5.5	E Invoicing
-	-	Request for Proposal 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 the any of the Conditions of Participation questionnaire stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.		

- 5.4.2. The Award stage of due process shall be marked against the following Award criteria to establish the Most Advantageous Tender(s) (MAT).
- 5.4.3. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.4.4. Any questions marked 'for information only' do not contribute to the scoring model.
- 5.4.5. 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.

Award 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 RFP. The Contracting Authority considers these weightings to be in line with existing best practice for a procurement opportunity of this type.				
Lot 1 – Training				
Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	L1 - AW5.1	Price	20.00%	20.00%
Technical	L1 – PROJ1.1	Approach to Public Policy Engagement training delivery	80.00%	30.00%
Technical	L1 – PROJ1.2	Contract Management and Continuous Improvement		20.00%
Technical	L1 – PROJ1.3	Project Team and Capability to Deliver		20.00%
Technical	L1 – PROJ1.4	Social Value - Equality, Diversity and Inclusion		10.00%
Lot 2 - Mentoring				
	Q No.	Question subject	Maximum Marks	

Evaluation Envelope			Overall	Breakdown
Commercial	L2 - AW5.1	Price	20.00%	20.00%
Technical	L2 – PROJ1.1	Approach to Public Policy Engagement mentoring delivery	80.00%	30.00%
Technical	L2 – PROJ1.2	Contract Management and Continuous Improvement		20.00%
Technical	L2 – PROJ1.3	Project Team and Capability to Deliver		20.00%
Technical	L1 – PROJ1.4	Social Value - Equality, Diversity and Inclusion		10.00%

Award Evaluation of criteria

Non-Commercial Elements

Each question will be evaluated 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:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

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-commercial scores are agreed, this will then be subject to an independent commercial moderation review.

Any bidder which achieves a score of less than 60 in any of the following technical questions will not be considered for appointment:

PROJ1.1

PROJ1.2

PROJ1.3

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 = $50000/50000 \times 12.5 = 12.5$

Bidder B Score = $50000/80000 \times 12.5 = 7.81$

Bidder C Score = $50000/100000 \times 12.5 = 6.25$

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.

Commercially Sensitive Bidder Content – Assessment Summaries

Commercial information provided as part of the bidding process

Notwithstanding the Contracting Authorities obligations to comply with the Freedom of Information Act (FOI) and the request for a confirmation of the same as part of your bid submission, contained within this procurement. The Contracting Authority is regulatorily obliged when issuing assessment summaries to issue a copy of the winning Bidders assessment summary to the unsuccessful Bidder(s), along with their own assessment summary as part of due process. Bidders should therefore ensure that they duly highlight this in the FOI exemption form, any and all areas of its bid that any Bidder deems to be commercially sensitive. Bidders shall clearly articulate what is sensitive and provide a commentary and justification for this not to be released, such as grounds that could or would prejudice the legitimate commercial interest of an individual Bidder e.g. a trade secret or unique selling points that would prejudice the Bidders unique system or delivery approach that may contain copyright and or prejudice fair competition between Bidders e.g. future mini competitions under a framework or similar procurement opportunities in the future.

Bidders should note that any claim for blanket confidentiality is naturally discouraged and cannot be accepted by the Contracting Authority, any uncertainties in regard to this area must be formally clarified during the clarification period.

Bidders are to note

For absolute clarity if no areas of the bid are highlighted or justified as commercially sensitive as required above, then this will be accepted and understood by the Contracting Authority that the Bidder does not have any commercially sensitive information in its bid and authorises the Contracting Authority to incorporate this information, as relevant to any assessment summary feedback obligations that have to be discharged as part of due process.

5.5. Evaluation process

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

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> RFP logged upon opening in alignment with UKSBS's procurement procedures in the eSourcing Portal. Any RFP Bid received after the closing date will be rejected unless circumstances attributed to UKSBS, the Contracting Authority or the eSourcing Portal beyond the Bidders control are responsible for late submission.
Compliance check	<ul style="list-style-type: none"> Check debarment question and debarment list for all Bidders, Subcontractors, PSC. Check all Mandatory / Discretionary grounds and other such requirements are acceptable to the Contracting Authority. Check compliance with the Conditions of participation both via unique identifier number on the CDP and in the Bidders submission. Bids maybe subject to clarification by the Contracting Authority or subject to exclusion and rejection of the Bid, dependent upon the extent or severity of the noncompliance identified and on a case-by-case basis so as to maintain the proper conduct and impartiality of the procurement.
Conflicts of Interests	<ul style="list-style-type: none"> The Evaluation team members will have Col re visited by UKSBS prior to being given access to the bids received in the eSourcing Portal.
Scoring of the Bid	<ul style="list-style-type: none"> The Evaluation team members will each independently score the Bid(s) and will provide a thorough commentary, of their scoring justification against the specific criteria.
Clarifications	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid based upon the formal clarifications and provide a commentary of their re-scoring justification against the Conditions of Participation questionnaire and Award criteria.
Consensus meeting	<ul style="list-style-type: none"> To conduct a consensus meeting to agree the Non-Commercial evaluation scores. To ensure that equal treatment of all bids has been done with impartiality. To confirm contents of the Assessment Summaries to provide details of scoring and feedback on the unsuccessful Bidders response in comparison with the successful Bidders Assessment Summary suitably redacted, whilst confirming the winning bidders Assessment Summary content
Due diligence of the Bid	<ul style="list-style-type: none"> The Contracting Authority may (as applicable) request the following from Bidders once initial and perceived award decisions have been made. <ul style="list-style-type: none"> Confirmation by the Bidder via an insurance provider that cover documents can be in place at the time of contract signature by the Bidder Request for bone fide email / physical evidence of documents / accreditations referenced in the Request for Proposal response Bid and or Clarifications from the Bidder

	<ul style="list-style-type: none"> ○ Taking up of Bidder references from the Bidders previous contracted parties ○ Confirmation that the Col statement made remains valid. ○ Confirmation that the Debarment / PSC statement remains valid. ○ Financial Credit check for the Bidder (usually undertaken by UKSBS)
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> • To undertake a feedback validation of the Bidder Assessment Summaries for the unsuccessful Bidders bid and the successful Bidders Assessment Summary content to be provided.
Issuing of Bidder Assessment Summaries	<ul style="list-style-type: none"> • The issue of the Supplier / Unsuccessful Bidder Assessment Summaries, so as to advise all bidders of the outcome of the procurement and to start the regulatory standstill period. The Contracting Authority will also be publishing a Contract Award Notice on the CDP.

Section 6 – Evaluation Response Questionnaires

PLEASE NOTE THE QUESTIONS MAY NOT BE NUMBERED SEQUENTIALLY

6.1. Technical and Commercial Questionnaire

- 6.2.1 Bidders should note that the procurement specific Technical and Commercial 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 MAY NOT NECESSARILY BE NUMBERED SEQUENTIALLY IF QUESTIONS NOT SPECIFIC TO THE PROCUREMENT ARE REMOVED FROM THE STANDARD OPEN PROCEDURE TEMPLATE

Section 7 – General information

7.1. Introduction

- 7.1.1. The Contracting Authority wishes to establish a Contract(s) for the provision of CSP250477 - UKRI Policy Fellowships Training and Mentoring Programme. The Contracting Authority is managing this procurement process in accordance with the Procurement Act 2023 and the Procurement Regulations 2024 applicable to this procurement procedure (as may be amended from time to time) (the “Regulations”). This is a Services Contract(s) being procured under the Open Procedure.
- 7.1.2. The Contracting Authority is procuring the Contract for its exclusive use.
- 7.1.3. UKSBS and the Contracting Authority logo, trademarks and other identifying marks are proprietary and may not be incorporated in the Companies response without the Contracting Authority’s written permission.
- 7.1.4. The Bidder shall indemnify and keep indemnified UKSBS and the Contracting Authority against all actions, claims, demands, proceedings, damages, costs, losses, charges, and expenses whatsoever in respect of any breach by the Bidder(s) of this document.
- 7.1.5. If there is any doubt with regard to any perceived ambiguity of any question or content contained in this questionnaire / procurement documentation, in regard to what is being requested, then PLEASE ASK a formal clarification question, but please ensure that your question is via the formal clarification process in writing to the UKSBS representative nominated. No approach of any kind in connection with this opportunity should be made to any other person within or associated with UKSBS or the Contracting Authority. All information secured outside of this named contact shall have no legal standing or worth and should not be relied upon when preparing or submitting any bid(s).
- 7.1.6. It remains the responsibility of all Bidders to keep UKSBS and the Contracting Authority suitably and promptly informed of any matter that may affect continued consideration and evaluation of your bid submission(s) during the evaluation stage up to the contract award signing stage e.g. any Debarment ground status, mandatory or discretionary grounds including any proposed parties, PSC, subcontractors(as applicable) or changes that may impact the proper conduct of the Contracting Authorities evaluation of all bids(s) received.
- 7.1.7. Prior to commencing formal evaluation, Submitted Responses will be checked to ensure that Bidders at that time are not on the Governments debarment list, this includes e.g. PSC etc. within the parameters of the bid submission. This will then lead onto the bids full compliance with the Pass / Fail criteria within the Evaluation model. Non-compliant Submitted Responses may be excluded for consideration of award dependent upon the factors that are established by the Contracting Authority. Submitted Responses which are deemed by the Contracting Authority to be fully compliant will proceed to evaluation. These will be evaluated using the criteria and scores detailed in the matrix set out in [Section 5](#).
- 7.1.8. Whilst it is the Contracting Authority’s intention to purchase the majority of its Services under this Contract Arrangement from the Supplier(s) appointed this does not confer any exclusivity on the appointed Suppliers. The Contracting Authority

reserve the right to purchase any Services and services (including those similar to the Services covered by this procurement) from any Supplier outside of this Contract.

7.1.9. The Contracting Authority reserves the right not to conclude a Contract as a result of the current procurement process. Bidders should review the contents of Section 7 paragraph 7.8.1 when considering submitting their Response.

7.1.10. The Services covered by this procurement exercise have been sub-divided into Lots.

Lot	Description	Number of successful suppliers required for this lot
Lot 1	Training Programme	1
Lot 2	Mentoring Programme	1

7.1.11. The Contracting Authority shall utilise the eSourcing Portal available at <https://beisgroup.ukp.app.jaggaer.com/> to conduct this procurement. There will be no electronic auction following the conclusion of the evaluation of the Request for Proposal (RFP) responses. Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing Portal.

All enquiries with respect to access to the eSourcing Portal and problems with functionality within the portal must be submitted to eSourcing Portal 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/>

7.1.12. Please utilise the messaging system within the eSourcing Portal located at <https://beisgroup.ukp.app.jaggaer.com/> within the timescales detailed in [Section 3](#). If you have any doubt as to what is required or will have difficulty in providing the information requested. Bidders should note that any requests for clarifications may not be considered by the Contracting Authority if they are not articulated by the Bidder within the discussion forum within the eSourcing Portal.

7.1.13. Bidders should that they read this document, and all attachment, messages and the response envelopes located within the eSourcing Portal carefully before completing the Response submission. Failure to comply with any of these instructions for completion and submission of the Submitted Response may result in the rejection and exclusion of the bid Response. Bidders are advised therefore to acquaint themselves fully with the extent and nature of the Services and contractual obligations. These instructions constitute the Conditions of Participation and Conditions of Response. Participation in the RFP process automatically signals that the Bidder accepts these Conditions as part of the bidding process.

7.1.14. All material issued in connection with this RFP shall remain the property of the Contracting Authority and shall be used only for the purpose of this procurement. All Due Diligence Information shall be either returned to the Contracting Authority or securely destroyed by the Bidder (at the Contracting Authority's option) at the conclusion of the procurement.

- 7.1.15. The Bidder shall ensure that each and every sub-contractor, consortium member and adviser abide by the terms of these instructions and the Conditions of Participation and Conditions of Response.
- 7.1.16. The Bidder shall not make contact with any other employee, agent or consultant of UKSBS or the Contracting Authority or Customer who are in any way connected with this procurement during the period of this procurement, unless formally instructed otherwise by the Contracting Authority.
- 7.1.17. The Contracting Authority shall not be committed to any course of action as a result of:
- 7.1.17.1. issuing this RFP or any invitation to participate in this procurement ;
 - 7.1.17.2. an invitation to submit any Response in respect of this procurement;
 - 7.1.17.3. communicating with a Bidder or a Bidder's representatives or agents in respect of this procurement; or
 - 7.1.17.4. any other communication between UKSBS or the Contracting Authority (whether directly or by its agents or representatives) and any other party.
- 7.1.18. Bidders shall accept and acknowledge that by issuing this RFP the Contracting Authority shall not be bound to accept any Response and reserves the right not to conclude a Contract for some or all the Services for which Responses are invited.
- 7.1.19. The Contracting Authority reserves the right to amend, add to or withdraw all or any part of this RFP at any time during the procurement. The Contracting Authority will suitably discharge its notices obligations in regard to any changes or Termination.
- 7.1.20. Bidders should not include in the Response any extraneous information which has not been specifically requested in the RFP including, for example, any sales literature, standard terms of trading etc. Any such information not requested but provided by the Bidder shall not be considered by the Contracting Authority, as part of its evaluation or scores apportioned.
- 7.1.21. If the Bidder is a consortium, the following information must be provided: full details of the consortium; and the information sought in this RFP in respect of each of the consortium's constituent members as part of a single composite response. Potential Providers should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium as indicated in the relevant section of the Conditions of Participation questionnaire SEL1.9 specifically refers. If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided as indicated in the relevant section of the RFP. However, please note the Contracting Authority reserves the right to require a successful consortium to form a single legal entity in accordance with the Regulations applicable to this procurement opportunity. The Contracting Authority recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the Contracting Authority so that it can make a further assessment by applying the Conditions of Participation questionnaire criteria to the new information provided and consider rejection of the Response if the Contracting Authority reasonably consider the change to have a material impact of the delivery of the viability of the Response.

7.2. Bidder conference

- 7.2.1. A Bidders' Conference will not be held in conjunction with this procurement.

7.3. Confidentiality

- 7.3.1. Subject to the exceptions referred to in paragraph 7.3.2, the contents of this RFP are being made available by the Contracting Authority on condition that:
- 7.3.1.1. Bidders shall at all times treat the contents of the RFP and any related documents (together called the 'Information') as confidential, save in so far as they are already in the public domain;
 - 7.3.1.2. Bidders shall not disclose, copy, reproduce, distribute, or pass any of the Information to any other person at any time or allow any of these things to happen;
 - 7.3.1.3. Bidders shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a Response; and
 - 7.3.1.4. Bidders shall not undertake any publicity activity within any section of the media in relation to this procurement
- 7.3.2. Bidders may disclose, distribute, or pass any of the Information to the Bidder's advisers, sub-contractors or to another person provided that either:
- 7.3.2.1. This is done for the sole purpose of enabling a Response to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Bidder; or
 - 7.3.2.2. The disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract arising from it; or
 - 7.3.2.3. The Bidder is legally required to make such a disclosure
 - 7.3.2.4. Any such disclosure if the procedure is run under the requirement of a Non-Disclosure Agreement or Contract, shall not be undertaken until such time as the recipient has signed and agreed to this same obligation and terms.
- 7.3.3. In paragraphs 7.3.1 and 7.3.2 above the term 'person' includes but is not limited to any person, firm, body, or association, corporate or incorporate.
- 7.3.4. UKSBS and the Contracting Authority may disclose detailed information relating to Responses to its employees, agents or advisers and they may make any of the Contract documents available for private inspection by its officers, employees, agents, or advisers. UKSBS and the Contracting Authority also reserve the right to disseminate information that is materially relevant to the procurement to all Bidders, even if the information has only been requested by one Bidder, subject to the duty to protect each Bidder's commercial confidentiality in relation to its Response (unless there is a requirement for disclosure as explained in paragraphs 7.4.1 to 7.4.3 below).
- 7.3.5. 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. Subject to section 7.4 below, the information will not be disclosed outside Government. Bidders taking part in this RFP consent to these terms as part of the competition process.

- 7.3.6. The Government revised its Government Security Classifications (GSC) classification scheme on the 2nd of April 2014 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 procurement will be subject to the new GSC from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

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

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

USEFUL INFORMATION LINKS

- [Find high value contracts in the public sector - GOV.UK](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

7.4. Freedom of information

- 7.4.1. 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 and the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 7.4.2. In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder shall complete the Freedom of Information declaration question defined in the Question FOI1.2 and identify such material and the justification of the sensitivity. This information is required to allow the Contracting Authority to complete and issue assessment summaries once an award decision(s) have been made, see also additional information and guidance in this documentation in regard to commercially sensitive information.

- 7.4.3. 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.
- 7.4.4. Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 7.4.5. Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including RFP templates such as this, are published on a designated, publicly searchable CDP via the internet and, that the same applies to other sourcing documents issued by the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred Supplier(s) once the procurement is complete (as applicable by the regulations). By submitting a response to this RFP Bidders are agreeing that their participation and contents of their Response may be made public, with due consideration by the Contracting Authority to commercially sensitive information declarations made under the template provided.

7.5. Response Validity

- 7.5.1. Your Response should remain open for consideration for a minimum period of 90 days. A Response valid for a shorter period will be rejected.

7.6. Timescales

- 7.6.1. [Section 3](#) of the RFP 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.

7.7. The Contracting Authority's Contact Details

- 7.7.1. 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.
- 7.7.2. 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 eSourcing 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 the Bid Response and further consideration for the procurement opportunity.

7.8. Preparation of a Response

- 7.8.1. Bidders must obtain for themselves at their own responsibility and expense all information necessary for the preparation of Responses. Bidders are solely responsible for all costs, expenses and other liabilities arising in connection with the preparation and submission of their Response and all other stages of the Conditions of Participation questionnaire and Conditions of Response to allow the Contracting Authority to undertake the evaluation process. Under no circumstances will UKSBS or the Contracting Authority, or any of their advisers, be liable for any such costs, expenses or liabilities borne by Bidders or their sub-contractors, supply chain or third parties in this preparation or process.
- 7.8.2. Bidders are required to complete and provide all information required by the Contracting Authority in accordance with the Conditions of Participation and Conditions of Response and the RFP. Failure to comply with the Conditions and the RFP may lead the Contracting Authority to exclude a bidders Response.
- 7.8.3. The Contracting Authority relies on Bidders' own analysis and review of information provided. Consequently, Bidders are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Responses and to undertake any investigations they consider necessary in order to verify any information provided to them during the procurement.
- 7.8.4. Bidders must form their own opinions, making such investigations and taking such advice (including professional advice) as is appropriate, regarding their Responses, without reliance upon any opinion or other information provided by the Contracting Authority or their advisers and representatives. Bidders should notify the Contracting Authority promptly of any perceived ambiguity, inconsistency, or omission in this RFP, any of its associated documents and/or any other information issued to them during the procurement via a formal clarification.
- 7.8.5. Bidders must ensure that each response to a question is within any specified page limit. Any responses with pages in excess of the page limit will only be consider up to the point where they meet the page limit, any additional pages beyond the volume defined in the page limit will not be considered by the evaluation panel as part of the evaluation and scoring process.
- 7.8.6. Bidders must ensure that each response to a question is not cross referenced to a response to another question. In the event of a Bidder adding a cross reference it will not be considered in evaluation process.

7.9. Submission of Responses

- 7.9.1. The Response must be submitted as instructed in this document through the e-sourcing tool. Failure to follow the instruction within each Section of this document, to omit responses to any of the questions or to present your response in alignment with any guidance notes provided may render the Response non-compliant and it may be rejected.
- 7.9.2. The Contracting Authority may at its own absolute discretion extend the closing date and the time for receipt of Responses specified [Section 3](#).
- 7.9.3. Any extension to the RFP response period will apply to all Bidders and will be covered in a published notice.

- 7.9.4. Any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Failure to adhere to this requirement will result in the Response being rejected and not being considered further in the evaluation process.
- 7.9.5. The Contracting Authority do not accept responsibility for the premature opening or mishandling of Responses that are not submitted in accordance with the instructions of this document.
- 7.9.6. The Response and any documents accompanying it must be in the English language
- 7.9.7. Bidders must submit their response through the e-sourcing tool, unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority. Responses received by any other method than requested will not be considered for the opportunity.
- 7.9.8. Responses will be submitted any time up to the date indicated in [Section 3](#). Responses received before this deadline will be retained in a secure environment, unopened until this deadline has passed.
- 7.9.9. Responses received after the date indicated in [Section 3](#) shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay is solely attributable to the Contracting Authority
 - 7.9.9.1. The Bidder must demonstrate irrefutable evidence in writing they have made best endeavours to ensure the Response was received on time and that the issue was beyond their control.
 - 7.9.9.2. Any request for a late Response to be considered must be emailed to <mailto:the Buyer in Section 3> in advance of 'the deadline' if a Bidder believes their Response will be received late.
 - 7.9.9.3. The Contracting Authority reserves the right to accept or exclude any late Response without justification to the affected Bidder and make no guarantee it will consider any request for a late Response to be considered.
- 7.9.10. Do not seek changes to the Bid after responses have been submitted and the deadline (date and time) for receipt of responses has passed.

7.10. Canvassing

- 7.10.1. Any Bidder who directly or indirectly canvasses any employee, or agent of UKSBS, the Contracting Authority, or its members or any of its employees concerning the establishment of the Contract or who directly or indirectly obtains or attempts to obtain information from any such officer, member, employee, or agent or concerning any other Bidder, Response or proposed Response will be disqualified.

7.11. Disclaimers

- 7.11.1. Whilst the information in this RFP, Due Diligence Information and supporting documents has been prepared in good faith, it does not purport to be comprehensive, nor has it been independently verified.
- 7.11.2. Neither UKSBS, the Contracting Authority, nor their advisors, nor their respective directors, officers, members, partners, employees, other staff or agents:

- 7.11.2.1. makes any representation or warranty (express or implied) as to the accuracy, reasonableness, or completeness of the RFP; or
 - 7.11.2.2. accepts any responsibility for the information contained in the RFP or for their fairness, accuracy or completeness of that information nor shall any of them be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.
- 7.11.3. Any persons considering making a decision to enter into contractual relationships with the Contracting Authority following receipt of the RFP should make their own investigations and their own independent assessment of the Contracting Authority and its requirements for the Services and should seek their own professional financial and legal advice. For the avoidance of doubt the provision of clarification or further information in relation to the RFP or any other associated documents (including the Schedules) is only authorised to be provided following a query made in accordance with Paragraph 7.15 of this RFP.

7.12. Collusive behaviour

- 7.12.1. Any Bidder who:
- 7.12.1.1. fixes or adjusts the amount of its Response by or in accordance with any agreement or arrangement with any other party; or
 - 7.12.1.2. communicates to any party other than UKSBS, or the Contracting Authority the amount or approximate amount of its proposed Response or information which would enable the amount or approximate amount to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Response or insurance or any necessary security); or;
 - 7.12.1.3. enters into any agreement or arrangement with any other party that such other party shall refrain from submitting a Response; or
 - 7.12.1.4. enters into any agreement or arrangement with any other party as to the amount of any Response submitted; or
 - 7.12.1.5. offers or agrees to pay or give or does pay or give any sum or sums of money, inducement or valuable consideration directly or indirectly to any party for doing or having done or causing or having caused to be done in relation to any other Response or proposed Response, any act or omission, shall (without prejudice to any other civil remedies available to the Contracting Authority and without prejudice to any criminal liability which such conduct by a Bidder may attract) be disqualified and not considered further for this opportunity

7.13. No inducement or incentive

- 7.13.1. The RFP is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a Bidder to submit a Response or enter into the Contract or any other contractual agreement.

7.14. Acceptance of the Contract

- 7.14.1. The Bidder in submitting the Response undertakes that in the event of the Response being accepted by the Contracting Authority and the Contracting Authority confirming in writing such acceptance to the Bidder, the Bidder will within 7 of being called upon

to do so by the Contracting Authority execute the Contract in the form set out in the Contract Terms or in such amended form as may subsequently be agreed.

- 7.14.2. The Contracting Authority shall be under no obligation to accept the lowest priced or any Response.

7.15. Queries relating to the Response

- 7.15.1. All requests for clarification about the requirements or the process of this procurement shall be made in through the eSourcing Portal unless the eSourcing Portal is unavailable due to system maintenance or failure, in this instance all clarifications shall be by email to the contact defined in [Section 3](#).
- 7.15.2. The Contracting Authority will endeavour to answer all questions as quickly as possible but cannot guarantee a minimum response time.
- 7.15.3. In the event of a Bidder requiring assistance uploading a clarification to the eSourcing Portal they should use the contact details defined in [Section 3](#).
- 7.15.4. No further requests for clarifications will be accepted after 26 days prior to the date for submission of Responses.
- 7.15.5. In order to ensure equality of treatment of Bidders, the Contracting Authority intends to publish the questions and clarifications raised by Bidders together with the Contracting Authority's responses (but not the source of the questions) to all participants on a regular basis.
- 7.15.6. Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if the Contracting Authority at its sole discretion does not either; consider the query to be of a commercially confidential nature or one which all Bidders would potentially benefit from seeing both the query and the Contracting Authority's response, the Contracting Authority will:
- 7.15.6.1. invite the Bidder submitting the query to either declassify the query and allow the query along with the Contracting Authority's response to be circulated to all Bidders; or
 - 7.15.6.2. request the Bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query prior to the end of the closing date and time for Bidder clarifications.
- 7.15.7. The Contracting Authority reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would or would be likely to prejudice a Bidders commercial interest.

7.16. Amendments to Response Documents

- 7.16.1. At any time prior to the deadline for the receipt of Responses, the Contracting Authority may modify the RFP by amendment. Any such amendment will be numbered and dated and issued by the Contracting Authority to all prospective Bidders. In order to give prospective Bidders reasonable time in which to take the amendment into account in preparing their Responses, the Contracting Authority may, at its discretion, extend the time and/or date for receipt of Responses and will duly update notices.

7.17. Modification and withdrawal

- 7.17.1. Bidders may modify their Response where allowable within the eSourcing Portal. No Response may be modified after the deadline for submission of Responses.
- 7.17.2. Bidders may withdraw their Response at any time prior the deadline for submission of Responses or any other time prior to accepting the offer of a Contract. The notice to withdraw the Response must be in writing and communicated to the procurement lead or team as identified by contact details within this document.

7.18. Right to exclude (notwithstanding as referred elsewhere in the RFP)

- 7.18.1. The Contracting Authority reserves the right to exclude a Bidder where
 - 7.18.1.1. the Bidder fails to comply fully with the requirements of this RFP or procurement and presents the response in a format contrary to the requirements of this document; and/or
 - 7.18.1.2. the Bidder is guilty of serious misrepresentation in relation to its Response; expression of interest; or the Response process; and/or
 - 7.18.1.3. there is a change in identity, control, financial standing or other factor impacting on the Conditions of Participation questionnaire and/or Award stage / evaluation process affecting the Bidder.

7.19. Right to cancel, clarify or vary the process

- 7.19.1. The Contracting Authority reserves the right to:
 - 7.19.1.1. cancel the evaluation process at any stage; and/or
 - 7.19.1.2. may require the Bidder to clarify its Response in writing and/or provide additional information. Failure to respond adequately may result in the Bidder being excluded for any award.

7.20. Notification of award

- 7.20.1. The Contracting Authority will notify the successful Bidder(s) of the Contract award formally and will publish a Contract Award Notice on the CDP and other such notices in accordance with the Regulations associated with this procurement.
- 7.20.2. As required by the Regulations associated with this procurement all successful and unsuccessful Bidders will be notified of the award decision(s) made and provided with Bidder assessment summaries, as applicable to the outcome of this procurement with regards to your bid(s) response.

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

DO:

- 8.1. Do read thoroughly and ensure comply with the procurement document instructions and outcomes sought when participating in this procurement opportunity. Any failure to do so may lead to your bid being deemed as non-compliant and or being rejected.
- 8.2. Do provide the Bid on time, complete and in the required format. Remember that the date/time given for a bid response is the last date that it can be accepted; we are regulatorily bound to Exclude late submissions. Responses received after the date indicated in the RFP shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay, is solely attributable to the Contracting Authority or due to an outage in the eSourcing Portal, an alternative way to submit bids has been formally advised by the Contracting Authority.
- 8.3. Do ensure you have read all the training materials to utilise eSourcing Portal prior to responding to this Bid. If you send your Bid by email or post unless instructed formally to do so by the Contracting Authority, then it will be rejected.
- 8.4. 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.
- 8.5. Do ensure you utilise the eSourcing Portal messaging system to raise any clarifications to the RFP. 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.
- 8.6. Do ensure you utilise and engage the eSourcing Portal helpline and assistance, if you are unsure or are having difficulties utilising the eSourcing Portal for registration and to be able to submit a bid. Do not contact the Buyer in regard to how to utilise the system, the eSourcing Portal provider has dedicated experts and is responsible for assisting all Bidders to use the system effectively, in its performance and service provision of the eSourcing Portal.
- 8.7. Do ensure that you allow a sufficiency of time to register on the CDP 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.
- 8.8. Do answer the questions fully, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid (unless the question specifically requests and allows you to do so) the evaluation team have timeline to assess all bids and if they can't find the answer, they are unable to score it.
- 8.9. Do seriously consider who the Contracting Authority is and what they want as an outcome of the procurement, a generic answer does not necessarily meet every

Contracting Authority's needs. If you are in any doubt or unsure about any aspect of the procurement, then please ensure that you utilise the assistive clarification process provided.

- 8.10. Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the specific question(s) they apply to.
- 8.11. Do provide clear, concise, and ideally generic contact details; telephone numbers, e-mails and as applicable details, so as this provides a contingency for bidding during holidays and potential staff absence e.g. sickness.
- 8.12. Do complete all questions in the Conditions of Participation questionnaire both via the registration steps on the CDP, as well as any RFP procurement specific questions and uploaded document requirement questions under this procurement or this may result in the rejection of your Bid.
- 8.13. 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.
- 8.14. Do check and recheck your Bid before uploading this to the eSourcing Portal and ensure that your bid has been uploaded complete and correctly.
- 8.15. 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.
- 8.16. Do keep the Contracting Authority aware in any changes that may have an impact upon your bid submission (including other parties associated and relied upon within your bid e.g. sub-contractors proposed) and the proper conduct of the procurement, such as but not limited to Debarment status / PSC/ Financial and Technical matters.
- 8.17. Do make sure that your organisation is registered on the CDP so as you are able to provide your bid and any other unique identifier number if this is relevant to your submission.

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

DO NOT

- 8.18. Do not just cut and paste from a previous document and forget to change the previous details relevant to this procurement or leave in such things as the previous Contracting Authorities name.
- 8.19. 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.
- 8.20. Do not share the Procurement documents, they may be confidential or potentially sensitive in nature to the Contracting Authority 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.
- 8.21. 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 the formal Buyer communications via the eSourcing Portal shall have no Legal standing or worth and should not be relied upon when submitting your bid submission.
- 8.22. Do not contact any UKSBS, Contracting Authority or third-party staff associated with the procurement without the Buyers written permission, or we may exclude your Bid.
- 8.23. Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will exclude your Bid.
- 8.24. Do not offer UKSBS or the Contracting Authority staff any inducement or we will exclude your Bid.
- 8.25. Do not provide if requested to do so or seek to provide 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.
- 8.26. Do not cross reference answers to external websites (unless the question specifically allows you to do so) or other parts of your Bid, the cross references and website links will not be considered during the evaluation process.
- 8.27. Do not exceed page limits, the additional pages will not be considered during the evaluation process.
- 8.28. Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid may be rejected, as defined within the procurement documentation.
- 8.29. 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 bid response by any way other than via the eSourcing Portal. Responses received by any other method than requested, will not be considered as received compliantly and will be rejected.

- 8.30. 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 Governments Debarment list, nor contains a PSC that will not be acceptable to the Contracting Authority.
- 8.31. 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.

Some additional Bidder guidance

- 9.1. 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

- 9.2. 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/>

- 9.3. All enquiries with respect to access to the CDP and problems with functionality within the portal must be submitted to Digital Platform Team / Helpdesk not the Contracting Authority to resolve.

Please note; the CDP is a free self-registration portal. Bidders can complete the online registration at the following link:

[Find high value contracts in the public sector - GOV.UK](#)
(Governments Central Digital Platform)

- 9.4. 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.
- 9.5. Question numbering is not always sequential and all questions which require submission are included in the procurement documents in excess of the CDP.
- 9.6. Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 9.7. We do not guarantee to award any Contract as a result of this procurement
- 9.8. All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 9.9. 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.
- 9.10. If you are a SPV, Consortium, Partnership you must provide details of the organisational structure and complete details, as required within the CDP.
- 9.11. Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 9.12. Bidders should note the Government's transparency agenda requires your information and any Contract (as applicable) entered into to be published on a designated, publicly searchable web site. By submitting a response to this RFP Bidders are agreeing that their Bid and any Contract may be made public

- 9.13. Your bid will be valid for 90 days or your Bid will be rejected.
- 9.14. 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.
- 9.15. 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.
- 9.16. If you fail mandatory pass / fail criteria this may result in the exclusion of your bid dependent upon the specific question and or circumstances.
- 9.17. Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the eSourcing Portal.
- 9.18. 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 the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.
- 9.19. 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.
- 9.20. 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.
- 9.21. 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 RFP consent to these terms as part of the competition process.
- 9.22. 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>
- 9.23. The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this RFP to reflect any changes

introduced by the GSC. In particular where this RFP 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.

9.24. USEFUL INFORMATION LINKS

[Equalities Act introduction](#)
[Bribery Act introduction](#)
[Freedom of information Act](#)

- 9.25. 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 tool to the designated UKSBS contact.
- 9.26. 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 exclusion of your Bid.

Appendix A – Glossary of Terms

TERM	MEANING
“Bid”, “Response”, “Submitted Bid”, or “RFP Response”	means the Bidders formal offer in response to this Request for Proposal.
“Bidder(s)”	means the organisation(s) responding to this Request for Proposal.
“Bidders Assessment Summaries”	Means the feedback defined as Supplier Assessment Summaries in the PA 2023
“Buyer”	means the person in UKSBS who is responsible for conducting the procurement for and on behalf of the Contracting Authority.
“Central Purchasing Body”	means a duly constituted public sector organisation which procures Goods and or Services for and on behalf of Contracting Authorities.
“Conditions of Participation or Conditions of Response”	means the new PA 2023 (replacing the old public procurement regime regulations) both on line via the CDP platform for parts 1&2 and part 3 via the eSourcing Portal. means the requirements set out to be met by Bidders in accordance with the Contracting Authority requests for information, during the Conditions of Participation and the conditions surrounding the application of the evaluation criteria up to contract award stage (as applicable unless otherwise stated) as set out in this RFP relating to the Bidders submission for consideration by the Contracting Authority.
“Central Digital Platform or CDP”	means the Government's new Central Digital Platform for all procurements (as applicable) competed under the new PA 2023 that all Bidders must successfully register on as applicable to each procurement dependant upon the organisational structure.
“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 described in the CDP. Procurement documents and Notice
“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.
“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.
“Direct Award”	means the award of a Call Off Contract (e.g. a Framework)by application of the terms laid down in the Contract without re-opening competition.
“Due Diligence Information”	the Contracting Authority may *request the following requirements at the award decision stage of the Procurement:

	<ul style="list-style-type: none"> ○ Submission of insurance documents from the Bidder ○ Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder ○ Taking up of Bidder references from the Bidders Customers. ○ Financial Credit check for the Bidder (*carried out by UKSBS not requested from the bidder)
"EIR"	mean the Environmental Information Regulations 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.
"eSourcing Portal"	means the online system that all potential Bidders must register on prior to registering an interest in a procurement opportunity and ultimately to provide a bid submission via.
"Excludable supplier"	means a Bidder is an 'excludable supplier' where the contracting authority considers, firstly, that a discretionary exclusion ground applies to the supplier or an associated person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A supplier will also be an excludable supplier where a Minister of the Crown has already determined this – i.e. where the supplier or an associated person is on the debarment list because of a discretionary exclusion ground.
"Excluded supplier"	means a Bidder is an 'excluded supplier' where the contracting authority considers, firstly, that a mandatory exclusion ground applies to the supplier or an associated person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A supplier will also be an excluded supplier where a Minister of the Crown has already determined this – i.e., where the supplier or an associated person is already on the debarment list because of a mandatory exclusion ground.
"FoIA"	means the Freedom of Information Act 2000 (as amended from time to time) and any subordinate legislation made under such Act 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 "	means any Goods and or Services set out at within Section 4 Specification
"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 (as applicable).
"PA2023"	means the Procurement Act 2023 and its associated 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 associated 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 opportunities 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 surrounding 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 CDP 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 the CDP.