



Research into Emerging Technologies in Greater Manchester

Tender Ref: MID2018/3

Document A
Invitation to Tender and Requirements
V3.0
July 2018



European Union
European Regional
Development Fund

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1.0 Letter of Invitation

Dear Sir/Madam

Invitation to Tender for Research into Emerging Technologies in Greater Manchester

You are hereby invited to submit a tender for the above services.

The Invitation to Tender contains Instructions and Information for Tendering, Specification of Requirements, Supplier Questionnaire (including Form of Tender and Pricing Schedule), and MIDAS Contract Conditions.

Tender submissions must be received by **3pm on Tuesday 7th August 2018**

If you wish to submit a response, you are required to return **two hardcopy proposals** and **one electronic version** of your proposal on USB or CD by **3pm on Tuesday 7th August 2018**. Envelopes should not identify your business in any way and you must clearly display the Tender Label.

Please note that if it is found that there is discrepancy between the hardcopy version and the electronic version, the hard copy version will take precedence.

All submissions are time stamped and any submissions received after this time will not be accepted.

If you have any questions about this tender or its process, please email them to: info@midas.org.uk.

We look forward to receiving your tender response.

Yours faithfully

Tim Newns
Chief Executive

2.0 Introduction

2.1 Document Pack

The purpose of this document is to set out the application procedure for service providers who wish to tender for the opportunity titled on Page 1 of this document.

On receipt of the Invitation to Tender (“ITT”), bidders should read all of the tender documents listed below. If you believe that any of these have not been provided to you then please contact info@midas.org.uk.

The ITT document pack includes: -

- Document A** (this document) – Invitation to Tender and Requirements
- Document B** – Written Tender Response for Supplier
- Document C** – Pricing Matrix
- Document D** – MIDAS Standard Terms and Conditions
- Document E** – Form of Tender
- Document F** – Questions and Answers Document*
- Document G** – Tender label

All documents are available to download at:

<http://www.investinmanchester.com/services/about/tenders/>

*Please note that Document F is a live document that will be updated on the website on a regular basis. It is your responsibility to ensure that you check this frequently as it may contain information of material significance which is critical to the submission of your tender. Please contact info@midas.org.uk to raise a question.

2.2 Procurement Timescales

The following table identifies the expected timeline for the remainder of the sourcing exercise: -

Activity	Timing
Invitation to Tender Issued	Wednesday 18 th July 2018
Tender Queries Deadline	Thursday 2 nd August 2018
Tender Deadline	3pm on Tuesday 7 th August 2018
Tender Scoring and Analysis	Wednesday 8 th August & Thursday 9 th August
Award Notification	Friday 10 th August
Envisaged Contract Start Date	Monday 13 th August

It is envisaged that no further amendments will be made to the timeline however all bidders will be notified if any amendments are made.

2.3 Introduction to MIDAS

MIDAS is the inward investment agency for Greater Manchester, providing free of charge advice and assistance to national and international organisations looking to locate in the area or expand their existing operations. MIDAS’ services include the provision of market research and labour information, assistance with finding property, access to finance and help to recruit and train staff.

For further information on MIDAS, please go to www.investinmanchester.com.

MIDAS is part of the Growth Company which has been established to achieve a transformation of the Greater Manchester economy, delivering on the priorities set out in the Greater Manchester Strategy – providing the research and analysis to drive policy and delivery, raising Greater Manchester’s profile,

attracting investment, helping businesses grow and providing individuals with new skills and employment opportunities.

Accountable to the Greater Manchester Local Enterprise Partnership and Greater Manchester Combined Authority (GMCA), MIDAS ensures inward investment is attracted to Greater Manchester and existing companies are supported to re-invest in the region.

To further develop these activities, MIDAS is engaged as a partner in European Regional Development Fund (ERDF) projects released by DCLG for the 2014-2020 ESIF Programme, which runs until December 2018. These bids were recently approved and as such will strengthen our provision of business support services across Greater Manchester and beyond, where required.

The delivery of support under ERDF requires MIDAS to comply with ERDF and public procurement guidelines. As a result this tender is designed to enable MIDAS to demonstrate compliance with these guidelines, ensure value for money and offer the opportunity to deliver the proposed support services for this project in an open and competitive way.

2.4 Responsible Procurement

MIDAS is committed to upholding the highest ethical conduct and social value in its activities. The successful bidder shall ensure that goods and services are produced and delivered under the following minimum standards, where:

- Employment is freely chosen. We have a zero-tolerance approach to the exploitation of workers
- There is no exploitation of children
- Pay at least the Real Living wage to employees
- Working conditions are safe and hygienic
- Working hours are not excessive
- No discrimination is practised
- Regular employment is provided
- The rights of staff to freedom of association and collective bargaining are respected
- No harsh or inhumane treatment of staff is allowed

2.5 Bribery and Corruption

MIDAS recognises that bribery is contrary to fundamental values of integrity, transparency and accountability and undermines organisational effectiveness. Midas staff may not accept gratuity, advantage or personal favour from suppliers or other business partner organisations.

We require our suppliers (including their sub-contractors) and other business partner organisations to show commitment to the prevention, deterrence and detection of bribery and implement effective anti-bribery measures in their business and supply chain.

2.6 Your Information and Data

At the Growth Company we recognise the importance of the privacy and the security of your personal information. Please see the below link to our Group Privacy Notice which explains how we process and look after your personal information and data.

<http://www.growthco.uk/privacy-policy/>

Please note that by submitting a response to a Midas procurement opportunity, your bid (whether successful or unsuccessful in obtaining the contract) will be held and processed in accordance with our Privacy Policy. In order to demonstrate our competitive procurement procedures for future audit and contractual compliance (such as those required by our funders) your response to Midas's procurement will be held and archived for a period of 25 years following the end of the contracted period.

3.0 Contract Details

3.1 Scope of Tender

3.1.1 Project Overview

This commission consists two distinct project packages, for which we are seeking one provider to deliver both. Therefore, bidders must bid for both packages in order to be considered (although consortium bids will be accepted where they are under a clear lead bidder/contractor)

Project Package A: Understanding and harnessing GM's emerging technology advantage.

1. An overview of the market Context & Opportunities
2. A study detailing and benchmarking:
 - Greater Manchester's university capabilities in relation to a range of predetermined key emerging technologies
 - Key emerging technology specialisms and expertise that exist within industry in Greater Manchester
 - Greater Manchester's other skills and infrastructure capabilities in relation to same emerging technologies

The reports produced during the first 2 phases of this package will inform delivery of the ERDF funded Innovation Service in GM, raising awareness of the capabilities of GM's universities and business ecosystem to deliver innovative activity within the four Industrial Strategy Grand Challenges and Northern Powerhouse Prime Capability sectors. It is also envisaged that the successful bidder may be required to present the report findings to relevant stakeholders and businesses at an "Innovate Manchester" event.

3. Marketing collateral for the GM emerging technology proposition: The creation of market ready proposition materials and narrative re Greater Manchester's emerging technology capabilities aimed at attracting potential inward investors into Greater Manchester

Project Package B: Understanding and engaging the opportunity presented by the DIGITAL transformation of 'non-technology' companies.

1. A report detailing GM investment opportunity presented through the digital transformation of large non-technology companies (e.g. OEM manufacturers, banks etc). The study should provide an overview of market trends, the scale of the opportunity, and a defined target list of 100 organisations which have the potential to locate or expand some, or all of their technology functions into Greater Manchester.
2. Further to the above, a validated short-list of 40 named priority strategic targets companies to be identified with justification for their inclusion. From this short-list, the provider should provide engagement support with senior decision makers within at least 20 of the target companies. This may be in the form of 1:1 meetings or round table events.

While there is a degree of interdependence between the two project packages, the intent would be that as far as possible, the project packages should run concurrently to accelerate delivery of outputs.

3.1.2 Detail of Requirements

Project Package A: Understanding and harnessing GM's emerging technology advantage.

Background

Greater Manchester has been creating the future for over 250 years. The original modern city; birthplace of the Industrial Revolution and more recently the city where graphene was isolated; ambition, creativity

and pioneering new ways of working are part of the region's DNA. As the UK's second largest economy, it is an economic powerhouse and its reputation as a "city of innovation" is today truer than ever. In recent years the city-region has negotiated a unique set of powers devolved by central government, giving the city unparalleled control over skills, transport and business support.

Greater Manchester is creating an innovation ecosystem where scientists, manufacturers, engineers, innovators and industrialists can converge, collaborate and drive innovation, creating a wealth of new opportunities. Creative and technology companies work alongside the region's established life sciences, healthcare, financial and professional services businesses to create the next wave of innovation. This is complemented by four leading universities with a proven track record for collaborating with industry on ground-breaking R&D in areas from health to data and cloud computing.

The importance of digital technologies and their ability to disrupt traditional business models give an opportunity to scale up and accelerate business growth across all sectors in GM in national and international markets. This will include new applications for digital technologies including health, business services, financial services and advanced manufacturing providing significant opportunities for existing and future entrepreneurs. Traditional industries are ramping up their investment in innovation, with non-technology companies on track to become the biggest investors in technology for the first time (CB Insights).

There is a strong consensus that emerging technologies such as Artificial Intelligence, Blockchain and Robotics will disrupt current business models in the next five years. As the pace of technological disruption increases, it is important for Greater Manchester to stay one step ahead and develop a greater understanding of its strengths in these emerging technologies which are playing an increasing role in both the attraction of inward investment projects and cementing Greater Manchester's place at the forefront of the digital revolution.

MIDAS wishes to commission research to understand Greater Manchester's offer in respect of a number of emerging digital and physical technology areas. The following is a non-exhaustive list of examples and prospective tenderers are encouraged to include any others of relevance:

Digital Technology Disrupters:

- Artificial Intelligence / Machine Learning / Big Data
- Immersive Tech/VR/AR
- Cyber Security
- Blockchain
- Fintech
- Ecommerce
- Digital Health
- Internet of Things and Smart Cities

Physical Technology Disrupters:

- Precision Medicine
- Advanced Materials
- Digital/Physical (Additive Manufacturing, Robotics)
- Energy storage
- Next generation communications / 5G / small cell tech
- Wearables

The technology areas outlined above are not exhaustive and would be further honed with the advice and guidance of the winning bidder.

Project Deliverables:

Phase 1: Understanding Market Context & Opportunities:

- **Market evolution:** A high-level consideration of and explanation of the **key global emerging** technologies and guidance re potential market size and economic impact.
- **UK Policy:** An overview re the UK government's policy response to these technologies to date and likely opportunities which could emerge for Greater Manchester.
- **Market:** A consideration of GM/UK public and private sector technology requirements which may provide an opportunity for GM's emerging technology cluster and/or provide an opportunity to attract foreign companies which have the capability to provide solutions from GM.

Phase 2: Understanding key GM capabilities and assets:

A study of GM's university, business and infrastructure capabilities in relation to the outlined digital and physical emerging technologies. A key work deliverable will focus on understanding Greater Manchester's advantages in relation to a defined list of digital and physical technology disruptors

Universities:

- Identify and understand which GM University capabilities are differentiated, world-class strengths that provide potential competitive advantage in securing technology and innovation led investment.
- Identify the relative state of maturity and quality of these strengths, benchmarking them against other leading UK and international competitors
- Provide a wider regional overview of the leading science assets in the North of England which either complement or fill the gaps in GM's emerging technology offer, to further bolster GM's overall proposition.

Business:

- **GM Cluster Capability:** To understand which of GM's companies (or global companies' GM operations) have clearly defined strengths in relation to the respective technology areas both at SME and large scale or that are involved in key global partnerships and supply chains.
- **Regional Capability:** To understand regional tech infrastructure, universities and companies throughout the North, which may further enhance GM's propositions.

Other Infrastructure & Assets:

- To consider other science and 'hard' infrastructure which may further enhance GM's proposition in relation to these technologies.

Talent:

- To understand GM's talent base in respect to these technology areas, both in GM itself and its regional commuter workforce (within a 1-hour commute, 50 miles). Again, this work should seek to understand where GM has competitive advantage versus other regions, both in the UK and internationally.

A key deliverable of this element of the research will be to determine where there is the potential to exploit the synergies between the specific strengths of GM's universities, businesses, infrastructure/assets and labour markets to create market growth opportunities.

This research will need to be robust enough to provide material which can both inform MIDAS' marketing collateral and be used to provide context to inform stakeholders and support wider GM policy initiatives.

Key stakeholders in this research will include: GMCA, Greater Manchester Universities, and potentially sector organisations such as Manchester Digital, Pro-Manchester's technology sector group, GM Tech Trust and Tech Manchester.

The research should build on and reference the GM and Cheshire East Science and Innovation Audit and the Northern Powerhouse Economic Review, both of which identified assets, rather than duplicate effort. Given this existing research – and known gaps in GM's existing knowledge – it is expected that a significant proportion of the above research will be spent on understanding business strengths.

Phase 3: Marketing the GM Emerging Technology Proposition

- To develop a set of fully developed, market ready proposition materials on each of the **key enabling** digital technology sub-sectors. The themes and creative execution for these would need to be agreed with MIDAS before work begins, and where possible would include the creation of a number of business case studies to help evidence Greater Manchester's capability.
- A high-level strategy recommending where best to target these propositions both in the UK and internationally.

Project Package B: Understanding and engaging the opportunity presented by the DIGITAL transformation of 'non-technology' companies.

Background

Traditional industries are ramping up their investment in innovation, with non-technology companies on track to become the biggest investors in technology for the first time (CB Insights). Innovation is increasingly based on digital technologies and business models, and the way businesses adopt digital technology is key for leveraging them for development. Many companies have a digital strategy in place, but the sheer pace of change has created a skills gap, which is stopping many of these more traditional companies from moving more quickly. IT skills are now ranked as 2nd as the hardest roles to fill behind trades (ManpowerGroup 2016/17 Talent Survey).

The technology sector in Greater Manchester benefits from critically important assets such as its four universities and the research expertise they provide as well as assets such as MediaCityUK and Manchester Science Partnerships where large clusters of technology knowledge exist. These assets provide space for idea-sharing, R&D collaboration and access to talent that is important not only for the sector, but for other sectors where technological change will contribute to further productivity growth.

MIDAS therefore seeks to commission a study detailing the GM investment opportunity presented through the digital transformation of large UK based, non-technology companies (e.g OEM manufacturers, banks etc). The study should provide an overview of market trends, the scale of the opportunity, and provide a defined target list of 100 which have the potential to locate or expand their technology functions into Greater Manchester. The main aim of this working being to target companies who can create new technology/digital jobs in Greater Manchester either by expanding their existing footprint here or by creating a presence in GM.

While we would expect most of these target companies to come from traditional industries, we would not want to exclude any technology companies identified during this exercise, however these should only form a very small proportion.

Target companies would likely be (These companies may or may not already have a UK base):

- Companies which are on a digital transformation journey where GM's R&D, talent and business clusters could provide a solution in accelerating their journey.
- Large blue-chip companies across a variety of industries who do not already have their technology functions in GM and are likely to be assessing their technology skill set in their current location(s) and might consider GM as a future location – particularly those who are experiencing difficulties recruiting in their current location.

- Companies who may be looking at a cost reduction exercise or who are looking for a location from which to grow their technology skill set as they are struggling to find the available digital skills in their current location.
- Companies who already have a base in GM who could either increase their technology footprint here or move some or all of their current and future technology functions to Greater Manchester.

We expect this research to:

- Identify which industries are most advanced on their technology journey and therefore have the greatest propensity to invest in their technology capabilities.
- Identify key companies which are looking to enhance their technology capabilities either by expanding their own in-house digital skills or by investing in R&D through collaborations.
- Information on which technologies these companies are likely to be assessing as an area for future growth and the corresponding skill set required.
- Identify the key person/people within that company who is leading the technology function and would be the decision-maker in terms of future investment.

Project Deliverables:

- a) Written report analysing the opportunities for traditional non-technology companies to re-locate some or all of their technological functions to GM, marrying up GM's strengths with Market Needs.
- b) Work with our in-house design and marketing teams on the development of a bespoke GM digital proposition for these target companies.
- c) A longlist of 100 target companies who are predominately traditional non-technology companies with technology departments, who are on a digital transformation journey, likely to be assessing their technology skill set in their current location(s) and might consider GM as a future location. (While we would expect most of these target companies to come from traditional industries, a very small proportion of technology companies may be identified during this exercise). A sound filtering model should be used to identify companies with a propensity to invest. MIDAS expects to receive details of the filtering model applied. We expect the high-level information on each company to include the following as a minimum:
 - company name
 - company size (employees and turnover)
 - country of origin
 - headquarter city
 - other UK/European city locations
 - sector
 - sub-sector
 - brief explanation of inclusion in the target list
 - Key contacts

MIDAS expects to approve this long-list before proceeding to the next stage.

- d) A shortlist of 40 companies with justification for their inclusion (evidence of their technology journey and propensity to invest). The shortlist should be based on an understanding of the research carried out, current market trends, knowledge of GM strengths and lead MIDAS to immediate and long-term prospects for inward investment. A sound filtering model should be used, and MIDAS expects to sign-off details of the criteria to be applied in identifying the company. MIDAS will receive justification on each company for their inclusion in the short-list (evidence of their technology journey and propensity to invest). We expect the following information to be provided for each company on the short-list, in addition to the information already provided as part of the long-list:
 - Company overview (products/services, strategy, profitability)
 - Operational Footprint (headcount, recent changes e.g. new sites/closures)
 - Triggers observed for the company to look at location strategy
 - Assessment of the company's alignment with Greater Manchester's strengths in emerging digital technology

- An understanding of key decision-making criteria
 - Individual contact names – appropriate current contacts within the senior management team (e.g. CEO/CFO/COO/MD/Head of Business Location Strategy etc.)
 - The angle for Greater Manchester
- e) Meetings arranged with C-Level decision makers at 20 of these companies (these can be individual face-to-face appointments or through attendance at a round-table event).

3.1.3 Providers Responsibilities

The supplier will provide MIDAS with:

Project Package A: Understanding and harnessing GM's emerging technology advantage.

- a) A written report (in Word format) with detailed research and analysis: "Understanding Market Context & Opportunities in emerging technologies".
- b) A written report (in Word format) with detailed research and analysis: "A study of GM's university, business and infrastructure capabilities in relation to the outlined digital and physical emerging technologies"
- c) A set of fully developed, market ready proposition materials (in Word format) on each of the emerging technology sub-sectors identified in the above report.

Project Package B: Understanding and engaging the opportunity presented by the DIGITAL transformation of 'non-technology' companies.

- a) A written report (in Word format) analysing the opportunities for traditional non-technology companies to re-locate some or all of their technological functions to GM
- b) A bespoke GM digital emerging technologies proposition (in Word format) to target these non-technology companies for inward investment.
- c) A researched long-list of 100 UK target companies (with a focus on, but not restricted to, traditional non-tech companies with technology departments who are on a digital transformation journey) with a high-level overview of each company. Details of the supplier's methodology for the selection of these companies should be detailed within the response to the tender.
- d) From this long-list, a validated short-list of 40 named priority strategic target companies, including a summary of each company and its investment potential within GM, with a clear methodology used to identify these targets. MIDAS expects to approve this short-list before proceeding to the next stage.
- e) Appointments arranged with a minimum of 40 of these short-listed companies, between a key decision maker at the company and a member of MIDAS's Business Development Team

The supplier will be required to:

- Liaise with the Head of Business Development to kick off the project
- Obtain sign-off from the Head of Business Development for each phase of activity, before proceeding to the next stage.
- Following completion of Phase 2 activity, agree with the Head of Business Development the list of emerging technologies to focus upon before commencing proposition development work.
- Provide a timeline of deliverables
- Identify methodology to be used
- Assign a Project Manager
- Provide a biography of the Project Manager and key team members
- Provide regular updates on progress throughout the project to ensure that deliverables are in keeping with client expectations.

- Initiate a regular conference call with the client to update on progress
- Present their final findings to steering group of key stakeholders.
- Maintain all material for potential future re-engagement to refresh or investigate further.

3.1.4 Performance Monitoring

MIDAS expects a to receive 8 individual pieces of work in total, detailed in section 3.1.3 Providers Responsibilities.

While there is a degree of interdependence between the two project packages, the intent would be that as far as possible, the project packages should run concurrently to accelerate delivery of outputs.

It will be important for the supplier to maintain contact with the relevant sector Head of Business Development through regular conference calls.

3.2 Duration and budget

The tenderer is invited to advise MIDAS of the timeframe to complete the project. It is envisaged that the project delivery would start on 13th August 2018, with an interim report of Package A completed within 3 months.

The total budget for this project is **£80,000–£100,000 excluding VAT**, split across the Project Packages as follows:

Package A:

- Phase 1 and 2 Budget: £25,000 -£30,000 (exc. VAT)
- Phase 3 Budget: £10,000 - £20,000 (exc. Vat)

Package B:

- Total Budget of £45,000 - £50,000 (exc. VAT)

3.3 Terms and Conditions

A copy of the proposed Contract Terms is provided in Document D. Please note that bidders are required to provide confirmation in the Form of Tender, Document E, that they accept the terms of the Contract and that this has been approved by Directors or Partners, insurers and legal advisors as required.

If any bidder has any queries regarding the terms of the agreement, then these should be clarified in writing prior to submission of tenders.

3.4 Subcontracting

Where information is requested by MIDAS in respect of your organisation on an on-going or ad-hoc basis, in the case where sub-suppliers are used by your organisation, you will be required either to provide this on their behalf or they (the nominated sub-suppliers) shall be required to provide this directly to MIDAS. Please note that only consultants who are selected for the contract following evaluation of tenders can be commissioned for work over the project lifetime.

3.5 Overview of the Process

MIDAS has elected to utilise a fully open single stage tender process, and all bidders are invited to submit a tender for this opportunity. Only those meeting MIDAS's Suitability Assessment requirements, however, will be eligible to have their tender assessed in full as set out below:

1. Minimum Suitability Assessment (Categories 1-6 in Document B –Tender Response and Documents C and E)

This is to assess tenderers against minimum standards with respect to economic and financial standing and technical capacity.

2. The full Written Tender Response (Category 7 in Document B Tender Response)

The full Written Tender Response is only assessed for those bidders who have passed the minimum standards questions and who will then be assessed on the deliverability and competitiveness of their submitted responses. The Written Tender Response allows for the following:

- Enables MIDAS to assess the competitiveness of each applicant's service provision;
- Any clarifications on bidders' responses can be assessed at the time of submission, and included within the evaluation. Bidders should note that the deadlines for responses to clarifications may be short, but must be met; and
- Ensures MIDAS can assess the overall strategic fit of the applicant with their aims and objectives.

The Written Tender Response will be evaluated on the basis of M.E.A.T, the 'Most Economically Advantageous Tender', i.e. as per the Public Contracts Regulations 2015, Best Price-Quality Ratio (BPQR), based on the criteria listed in Section 4.5.

4.0 Tender Submission and Evaluation

4.1 Instructions for Submission and Deadline

This section sets out the documents that you will need to complete in order to submit a tender. It is essential that you read this section carefully and also all of the tender documentation and that you ensure that, when submitting your tender, all of the required information requested is provided.

Any tender that has not been submitted in line with the instructions provided may be deemed to be non-compliant and will not be evaluated.

Bidders are required to initially submit:

1. A Written Tender Response (Document B) answering the Tender Specific Questions (one per lot) and a Suitability Assessment Questionnaire (one per supplier).
2. A Pricing Matrix (Document C) to be completed by the organisation/company
3. Form of Tender (Document E) - hard copy with wet ink signature, to be completed by the organisation/company

MIDAS does not acknowledge receipt of tender documents and accepts no responsibility for loss or non-receipt of applications.

4.2 Freedom of Information

MIDAS is committed to meeting its legal responsibilities under the Freedom of Information Act 2000 (the "Act"). Accordingly, all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the Act. MIDAS may also decide to include certain information in the publication scheme which it maintains under the Act.

If a bidder considers that any of the information included in their tender is commercially sensitive, it should identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity.

Bidders should be aware that, even where they have indicated that information is commercially sensitive, MIDAS may be required to disclose it under the Act if a request is received.

Bidders should also note that the receipt of any material marked 'confidential' or equivalent by MIDAS should not be taken to mean that MIDAS accepts any duty of confidence by virtue of that marking.

4.3 Queries and Support

If you have a query which has not been addressed by this document or the supporting documentation, please submit a question via info@midas.org.uk.

Please ensure any question has the following in the Subject:

TENDER CLARIFICATION QUESTION: CONTRACT REF MID2018/3.

Emailed questions that do not contain this information in the subject heading will not be answered.

In order to ensure that responses to all queries can be published in advance of the tender deadline, we ask all bidders to submit queries by the date stated for "Tender Queries Deadline" in 2.2 of this document. Any questions received after this date may not be answered.

To ensure equality of treatment amongst all participants any relevant clarification responses will be made available to all bidders at www.investinmanchester.com/tenders in a Q&A document (Document F) that will be updated and uploaded on a regular basis.

Publication of the questions is subject to the material significance of the question. Questions which relate to bidders' commercially sensitive information, or are directly applicable to one applicant, shall be suitably censored prior to publication, to retain anonymity, but bidders must explain and justify why the information is regarded as commercially sensitive; the presumption which MIDAS will apply is that it is not.

Bidders should note that the clarification questions and answers form part of the ITT supporting documentation.

4.4 Word Limits

Within the Document B - Written Tender Response, a number of questions state a maximum word count and the answer to these questions must be limited to the maximum number of words indicated. Please note that any content which exceeds this word limit in respect of each question will not be scored and will be disregarded when evaluating the Tender Response.

Appendices, charts, diagrams or screenshots may be included and do not count towards the total word limit.

The evaluation team will not consider any references to external sources/hyperlinks referenced in your bid.

4.5 Evaluation of Tenders

Following the submission deadline, tenders will be evaluated by a scoring team comprising representatives of the MIDAS.

Bidders may be required to clarify aspects of their submission in order to ensure that they have understood the specification requirements. Bidders will be contacted individually regarding any such clarifications. Please note that the deadlines for clarification responses may be short, but must be met in order that submissions can be included within the evaluation process.

Tenders will be subject to a staged evaluation process as follows:

4.5.1 Stage 1: Initial Screening Assessment

Each submitted tender will be subject to an initial screening assessment to confirm that:

- The tender has been submitted on time, is completed correctly, is materially complete and meets the Suitability Assessment (Minimum Standards) requirements of this Invitation to tender to enable it to be evaluated in accordance with the evaluation criteria;
- The bidder has not contravened any of the terms and conditions of the tender process either provided in the Public Contracts Regulations 2015 and/or this Invitation to Tender.

Tenders that are not substantially complete or which are non-compliant with the requirements of the Invitation to tender will be rejected at this stage.

4.5.2 Stage 2: Suitability Assessment (Minimum Criteria)

There are a number of criteria which must be satisfied in order for an applicant to be eligible to proceed to the capability / quality evaluation stage. The completed Suitability Assessment questions (Document B Written Tender Response) will be evaluated first and scored on a pass or fail basis. Guidance is provided below in Appendix 1.

Category	Criteria	Section Weighting
Suitability Assessment	1. Company Background	Information Only
	2. Mandatory Requirements	Pass/Fail
	3. Discretionary Exclusions	Pass/Fail
	4. Insurance	Pass/Fail
	5. Economic and Financial Standing	Pass/Fail
	6. Social Value	Pass/Fail

4.5.3 Stage 3: Quality and Price Evaluation

Tenders which are successful following the initial screening assessment will be subject to a detailed evaluation in accordance with the evaluation criteria and weightings set out below: -

Criteria	Weighting
Quality	75%
Price	25%
Total	100%

i) Quality Evaluation

Responses to each of the written tender questions (**see Document B, Category 7**) will be scored by the evaluation panel out of a maximum of five marks, using a standard method of scoring as set out in the table below:

Score	Scoring Guidance
5	<p>In respect of each element of the Services identified in the question, the proposals fully explain how the relevant element will be delivered to the standards required, throughout the term.</p> <p>The proposals are clear, precise and robust.</p> <p>The explanation is sufficient to give Midas a high degree of confidence that all of the stated objectives will be delivered.</p>
4	<p>In respect of each element of the Services identified in the question, the proposals explain how the relevant element will be delivered to the standards required, throughout the term.</p> <p>The proposals are clear, precise and robust.</p> <p>The explanation is sufficient to give Midas a high degree of confidence that the stated objectives will, for the most part, be delivered. To the extent that the explanation is not sufficient to give Midas that high degree of confidence, the explanation does not raise concerns</p>
3	<p>In respect of each element of the Services identified in the question, the proposals explain, to some extent, how the relevant element will be delivered to the standards required, throughout the term.</p> <p>The proposals are clear, but there are some concerns around precision and/or robustness.</p> <p>The explanation is sufficient to give the Midas confidence that the stated objectives will, for the most part, be delivered. To the extent that the explanation is not sufficient to give the Midas that confidence, the explanation raises one or more concerns but no material concerns.</p>
2	<p>In respect of each element of the Services identified in the question, the proposals explain, to some extent, how the relevant element will be delivered to the standards required, throughout the term, but for certain elements the explanation is very limited.</p> <p>There are concerns around the clarity, precision and/or robustness of the proposals.</p> <p>The explanation is sufficient to give Midas confidence that the stated objectives will be delivered to some extent. To the extent that the explanation is not sufficient to give Midas that confidence, the explanation raises one or more concerns, one of which is a material concern.</p>

Score	Scoring Guidance
1	In respect of one or more elements of the Services identified in the question, the proposals fail to explain to any extent how the relevant element will be delivered to the standards required, throughout the term; and/or the proposals are not clear; and/or the explanation is insufficient to give Midas confidence that the stated objectives will be delivered and/or the explanation for any one or more of the elements raises multiple material concerns.
0	No response or response is irrelevant to the question asked.

Any Bidder scoring either a 0 or 1 for any quality questions will be excluded from the process.

Please do not make references to other questions within your submission or other documentation/external sources of information.

Guidance for completing this section can be found in Appendix 2.

During the evaluation of quality submissions, MIDAS reserves the right to call for further information or clarification from bidders, as appropriate to assist in its consideration of their tender. In addition, MIDAS reserves the right to exclude from the tendering process any organisation that is found to have provided false information or has misrepresented themselves during the tender process.

ii) Price Evaluation

Details of the pricing framework are presented in **Document C**.

Evaluation of the submitted pricing will be as follows:

- a. For Total of Tender Offer, a score shall be calculated by reference to the lowest price submitted. This lowest price will be given a points score of 100 and all other scores will be awarded scores relative to that cost using the following formula:

$$\text{Pricing score} = (\text{Lowest Submitted Total Service Cost} \div \text{Total Service Cost}) \times 100$$

Please see a worked example below:

Applicant 1 - £110

Applicant 2 - £175

Applicant 3 - £200

Applicant 1 would receive 100 marks as they submitted the lowest price.

*Applicant 2 would receive 62.9 marks as follows: $110/175 * 100 = 62.9$*

*Applicant 3 would receive 55 marks as follows: $110/200 * 100 = 55$*

- b. The score will then be weighted to give a resultant score out of the weighting % detailed in 4.5.3 for the pricing submission.
- c. In scoring the tenders and at the discretion of MIDAS, where it is considered that a tendered price is unrealistically low and/or unsustainable, the lowest tender judged to be realistic and sustainable will be taken as the benchmark for the purposes of price evaluation. The new benchmark and all of those lower than it will receive maximum marks and the others scored relative to that as set out above.

4.6 Interviews

MIDAS reserves the right to hold clarification interviews if required.

If the option to interview is taken no more than three highest scoring bidders will be invited and bidders selected for interview will be informed in writing.

The interview will be not scored but used to moderate your scores by clarifying information provided in your company's bid.

4.7 Contract Award

Following completion of the evaluation process above, scores will be collated and ranked. The Contract will then be awarded to the highest-ranking bidder. All bidders will be informed of the award decisions in writing (via email).

5.0 Social Value

5.1 The Growth Company Ethos

Social value is at the core of the Growth Company's ethos, and we have adopted the principals set out in the [GMCA Social Value Policy](#). Social Value is defined in the policy as follows:

'A process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and economy, whilst minimising damage to the environment.'

GC seeks to drive positive outcomes by focussing on the following;

- **promote employment and economic sustainability** – tackle unemployment and facilitate the development of skills
- **raise the living standards of local residents** – working towards living wage, maximise employee access to entitlements such as childcare and encourage suppliers to source labour from within Greater Manchester
- **promote participation and citizen engagement** - encourage resident participation and promote active citizenship
- **build the capacity and sustainability of the voluntary and community sector**– practical support for local voluntary and community groups
- **promote equity and fairness** – target effort towards those in the greatest need or facing the greatest disadvantage and tackle deprivation across the borough
- **Promote environmental sustainability** – reduce wastage, limit energy consumption and procure materials from sustainable sources.

At GC, we want to work with suppliers who can support our aim to incorporate Social Value in what we do, and understand that the way we conduct our business can make a positive impact in our society. We are proud to make a positive difference to businesses, communities and individuals we work with and continue to build our approach.

During this process we want to understand **your business values**, and see how you deliver Social Value through your ways of working and business ethics. We want to understand how your work makes a wider impact on the places and people in your community.

5.2 Bidders Response

The following is provided to help suppliers understand GC's values in regard to Social Value, and how we as a company deliver social value. This is intended to provide a reference point for suppliers who are bidding on this opportunity, so that you can understand what is important to us, and also provide a starting point for suppliers to understand how your existing values and business ethics can integrate with GC.

At GC we want to make sure that that through this contract, and our relationship with our chosen supplier/s we can work together to make a significant impact in this area.

At GC we recognise the contribution we can make to increasing social value through our own direct impact as a large employer. Our impact can be categorised in terms of four key areas;

- **Our supply chain and the goods and services we buy**

We use our purchasing power to support, influence and secure social value from our suppliers, and we ask our suppliers how they can support our six key Social Value objectives as identified above. This forms part of our evaluation process and our contract management processes.

- **Our environmental impact**

We have identified the key aspects where we have a negative impact on the environment, namely: heating and cooling, travel to clients, IT and paper; and we have a policy and systems in place to measure, manage and reduce these impacts.

- **Our organisational development**

We use our apprenticeship and traineeship policy to ensure roles are designed such that the broadest possible range of residents can apply and are advertised in ways to ensure they are aware of the opportunities. On joining the company staff are able to access a structured learning and development programme to increase their knowledge and skills and benefit from our comprehensive Reward and Recognition programme.

- **Our support for our local communities**

In addition, we can make a positive difference through the services we provide by:

- ensuring we continue to develop services which meet the needs of those customers who are often less able to participate in mainstream support
- ensuring we continually review how we can make improvements to the Social Value we create in the communities we support.

This includes supporting:

- supporting people to enter or return to the labour market after periods of exclusion
- supporting people to realise their potential in higher paid roles by increasing their skills
- supporting business to grow and connect with their communities while reducing environmental impact
- supporting business to grow and develop creating good jobs in good companies
- supporting employers to develop and retain their staff in fulfilling roles
- supporting employers to recruit staff from local or excluded communities

Bidders should note that this is not an exhaustive list, and is an extract only of GC's approach which sits alongside other organisational initiatives.

6.0 Additional Tender Conditions

- i. All responses to this Invitation to Tender must be in English.
- ii. Bidders are responsible for obtaining all information necessary for the preparation of their tender submission. Whilst MIDAS will use its best endeavours to see that all information provided is truthful and accurate, bidders must satisfy themselves as to the accuracy of any information provided by MIDAS, and MIDAS do not accept any liability whatsoever for any loss or damage caused or arising from or in consequence of the use of such information;
- iii. All costs and expenses associated with applying for this opportunity shall be the responsibility of the applicant, without recourse to MIDAS, and neither MIDAS nor any of its representatives will be liable in any way to any applicant or other person for any costs, expenses or losses incurred by any applicant or other person in connection with this bidding process;
- iv. MIDAS has the right to discontinue with this sourcing exercise at any time and not award any contract, and shall notify bidders accordingly;
- v. MIDAS shall not be legally bound to any organisation until the resulting contract has been agreed and signed by all stakeholders.
- vi. The bidder must not inform anyone else of their tendered price. The only exception is where the bidder is required to obtain an insurance quotation to calculate the tender price; then the bidder may give details of their bid to the insurance company or brokers, if requested;
- vii. The bidder must not try to obtain any information about any other party's tender or proposed tender before the contract is awarded;
- viii. All elements of tender submission, including responses to clarifications, will form the basis of the contractual arrangement with MIDAS;
- ix. Where invoices will be rendered by, or payments made to, an entity whose title differs in any respect from the title in which the tender is submitted, full details must be provided in a letter accompanying the tender. Successful bidders who fail to provide this will experience non-payment of their invoices;
- x. Bidders should note that MIDAS is not bound to accept any tender submission under this tender and reserves the right at its absolute discretion to accept or not accept any tender submission or part of any tender submitted under this Invitation to Tender.
- xi. Bidders should note that during this tender process they should not contact any of the MIDAS respective Board Members, Senior Managers, employees or advisers or any part of the Economic Solutions Limited Group, or third parties connected to the MIDAS or any advisers to this procurement, outside of the process outlined within this document.
- xii. Bids shall remain open for acceptance for a minimum of 90 days.

Appendix 1: Organisation Details and Suitability Assessment – Guidance for Completion

Only those who pass the Suitability Assessment questionnaire element and therefore are able to meet MIDAS’s minimum standards shall be eligible to have their tender evaluated in full and in line with the Overall Contract Award Criteria specified. Responses should be captured in Document B by each bidder organisation

The Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (we call this self-cleaning).

Consequently we require all the organisations that you will rely on to meet the selection criteria and may be asked to complete Categories 1-3. For example these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria.

Organisation Details and Suitability Assessment

Category Number	Question Number	Question	Possible Answers	Answer
Category 1 Organisation Background	1.1	Please provide the Registered Company Name and Address of your organisation. (This should be the full company name as it would appear within the contractual documentation if successful)	Name Address	Information Only
	1.2	Please provide postal address if different from above	Address	Information Only
	1.3	Please confirm the key contact for this project on-going including name, email address and direct telephone number.	Name Email Address Telephone Number	Information Only
	1.4	Please confirm the email address to be used for any communications with regard to this tender offer.	Email Address	Information Only
	1.5	Are you a Small, Medium or Micro Enterprise (SME)?	Yes/No	Information Only

Category Number	Question Number	Question	Possible Answers	Answer
	1.6	Is your organisation a:	PLC Limited Company Sole Trader Partnership Other	Information Only
	1.7	If other, please specify.	Free Text	Information Only
	1.8	If operating as a Partnership, please state the number of Partners.	Free Text	Information Only
	1.9	If your organisation is a member of a group of companies, please provide further details on the holding company, and details of the organisations which make up your group. (maximum response 250 words)	Free Text	Information Only
	1.10	Please provide the date your organisation commenced trading.	Free Text	Information Only
	1.11	Please provide your Company Registration Number.	Free Text	Information Only
	1.12	Please provide your VAT Registration number.	Free Text	Information Only
	1.13	Please select either a or b and answer as applicable; a) Your organisation is bidding to provide all the services required b) Your organisation is bidding in the role of Prime Contractor and intends to subcontract some of the services to third parties to deliver the services.	a or b	
	1.14	If your answer to above is (b), please give details of legal arrangements between partners and supply the following information for each sub-contractor to be used. Name;	Free Text (Use separate sheet if required)	Information Only

Category Number	Question Number	Question	Possible Answers	Answer
		Registered address Trading status Company registration number Registered VAT number Type of organisation SME (Yes/No) The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables The approximate % of contractual obligations assigned to each sub-contractor		
Category 2 Grounds for mandatory exclusion	2.1	Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences below?	Yes or No	The detailed grounds for mandatory/discretionary exclusion of an organisation are set out on this webpage , which should be referred to before completing these questions If an Organisation answers Yes to any of the statements, MIDAS shall disqualify that Organisation from the process at this point in the evaluation, pending consideration of the self-cleaning statement This information will be used to determine whether suitable measures have been implemented to rectify the situation and prevent
		i. Participation in a criminal organisation	Yes or No	
		ii. Corruption.	Yes or No	
		iii. Fraud.	Yes or No	
		iv. Terrorist offences or offences linked to terrorist activities	Yes or No	
		v. Child labour and other forms of trafficking in human beings	Yes or No	
		vi. Money laundering or terrorist financing	Yes or No	
	2.2	a) If you have answered yes to the question 2.1, please provide further details.	Free Text	

Category Number	Question Number	Question	Possible Answers	Answer
		Including; date of conviction, which grounds the listed conviction was for and the reason for the conviction. Please identify who has been convicted and complete Section 2.2(b) & 2.2(c) where applicable.		future reoccurrence. If your organisation was at fault and suitable action not taken - automatic exclusion. The Information provided will be reviewed by MIDAS Project Team (Project Team).
		b) Where an individual has been identified, please enter the name of the individual.		
		c) (To be completed by the individual identified) I confirm that the details contained within sections 2.1 & 2.2 can be used by GC for the purposes of processing and evaluating this Selection Questionnaire including any self-cleaning identified in 2.3.		
	2.3	If you have answered Yes to any of the points above, have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (self-cleaning)	Yes or No	
	2.4	Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?	Yes or No	
	2.5	If you have answered yes to question 2.4, please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.	Yes or No	
Category 3 Grounds for discretionary exclusion	3.1	Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation		
		i. Breach of environmental obligations?	Yes or No	

Category Number	Question Number	Question	Possible Answers	Answer
		ii. Breach of social obligations?	Yes or No	
		iii. Breach of labour law obligations?	Yes or No	
		iv. Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation's assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended, or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State?	Yes or No	
		v. Guilty of grave professional misconduct?	Yes or No	
		vi. Entered into agreements with other economic operators aimed at distorting competition?	Yes or No	
		vii. Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure?	Yes or No	
		viii. Been involved in the preparation of this procurement procedure?	Yes or No	
		ix. Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions?	Yes or No	
	3.2	If you have answered Yes to any of the above (3.1), explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion?	Free Text	
Category 4 Insurance	4.1	Please confirm if you currently have, or are willing to commit to the £5 million pounds minimum required level of Employers Liability Insurance applicable for each and every occurrence.	Yes No N/A Willing to Commit to	If no, automatic exclusion. If you answer N/A, please state why

Category Number	Question Number	Question	Possible Answers	Answer
			taking out insurance to the required level if awarded the contract	
	4.2	Please confirm if you currently have, or are willing to commit to the £1 million pounds minimum required level of Public Liability Insurance applicable for each and every occurrence.	Yes No Willing to Commit to taking out insurance to the required level if awarded the contract	If no, automatic exclusion.
	4.3	Please confirm if you currently have, or are willing to commit to the £1 million pounds minimum required level of Professional Indemnity Insurance applicable for each and every occurrence.	Yes No Willing to Commit to taking out insurance to the required level if awarded the contract	If no, automatic exclusion.
Category 5 Economic and Financial Standing	5.1	Please provide one of the following to demonstrate your economic/financial standing; (a) A copy of the audited accounts for the most recent two years. (b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation.	Please state which option provided 	Enclosure Required.

Category Number	Question Number	Question	Possible Answers	Answer
		<p>(c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.</p> <p>(d) Alternative means of demonstrating financial status if any of the above are not available (e.g. Forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).</p>	<p>Enclosure Required</p> <p>(Please note only one copy required)</p>	
Category 6	6.1	Use this opportunity to identify how your values as a business (that is, your Social Value strategy or approach to Corporate Social Responsibility) will be integrated into your approach in delivering this contract. Please identify where your approach is aligned with TGC/BSS.	Free Text (max 200 words)	The Information provided will be reviewed by the Midas Project Team (Project Team).

Should you have any queries regarding the requirements of the Suitability Assessment questionnaire, please raise these using the clarification process set out in Section 4.

Appendix 2: Written Tender Guidance

The weighting of individual tender questions are stated in Document B Written Tender Response (Category 7)

Form of Answers - Marks are awarded for clear and concise answers, with the relevant examples and detail where relevant. We do not wish to receive long and unstructured answers; the character limits are an indication of detail required but answers should still be concise.

The information you provide in your answers should be relevant to your organisation and the opportunity for which you are applying. Bidders should note that the weightings of the questions which indicate the importance of that question and ensure that their answers are structured accordingly; ensuring that you provide sufficient and relevant detail in the question response is critical.

The character limits have been set and shall not be changed. (See 4.4)

Bidders should also note that only information provided in the text boxes shall be considered in response to the question – the evaluation team shall not consider any attachments (other than those that may have been specifically requested), references to external sources or current knowledge of the applicant.

Should you have any queries regarding the requirements of the tender questionnaire, please raise these using the clarification process set out in 4.3.

You should retain duplicate copies of your completed Tender Response for your own records.

Appendix 3: Pricing Guidance

Bidders are required to complete all sections of the **Pricing Matrix (Document C)** for the opportunity for which they have been invited to tender. All fields in red font should be completed on the pricing document and any fields which are not completed may affect the evaluation of your tender.

Please ensure you read the instructions detailed within Document C, prior to completing your pricing matrix.

When completing the pricing submission, bidders should consider the following:

1. Prices will be fixed for the duration of the contract.
2. The prices in the Pricing Schedule shall include for all goods and services shown or described in the contract as a whole and for all goods and services not described but apparent as being necessary for the complete and proper execution of the provision of the contract.
3. Each item in the Pricing Schedule must be fully priced, with insertions for each item. If any item is un-priced (whether by leaving the rate and/or amount space blank or by entering "included" or otherwise), that item shall be deemed to be free of charge.
4. Payment shall be made in accordance with the procedures described in MIDAS' Terms and Conditions (*Document D*).
5. All prices quoted shall be exclusive of Value Added Tax (VAT).
6. Figures inserted into the pricing schedule must be a single figure and not a range of figures. If a range of figures are submitted, MIDAS will evaluate this offer on the basis of the highest figure quoted within the range, thus attracting the lowest possible score.