



Oxfordshire Growth Needs Assessment

INVITATION TO TENDER

Introduction

1. The city and district councils in Oxfordshire¹ have agreed to produce a Joint Statutory Spatial Plan (known as the 'Oxfordshire Plan') which builds upon existing joint working and partnership arrangements through the Oxfordshire Housing and Growth Deal. The Oxfordshire Plan will provide a strategic planning policy framework for Oxfordshire to 2050.
2. The Oxfordshire Plan is being prepared in partnership with Oxfordshire County Council which has a key role given its responsibilities for the delivery of key infrastructure and services, as well as the Oxfordshire Local Enterprise Partnership (OxLEP) which has produced the Local Industrial Strategy (agreed by Government in July 2019).
3. The Oxfordshire Plan will look beyond current adopted and emerging Local Plans in Oxfordshire which plan to 2031, 2034 or 2036 and will identify the number of new homes, the level of economic growth and related infrastructure that is needed across Oxfordshire to 2050. This will set the scene for a future round of Local Plans where the local planning authorities will subsequently establish detailed planning policies and site allocations at a local level.
4. Oxford City Council, acting on behalf of the partnership of Oxfordshire's city and district authorities, is seeking to appoint a consultant to produce an assessment of Oxfordshire's Growth Needs to inform and support the production of the Oxfordshire Plan 2050. As such the commission will be overseen by a steering group of officers from across the councils, with the Oxfordshire Plan 2050 team coordinating the project as main point of contact.
5. Tender submissions should be submitted via the South East Business Portal by **9am on 2nd December 2019**.

Background to the Oxfordshire Plan

6. The Oxfordshire Plan will cover the administrative area of Oxfordshire. The city/district councils have committed to this process as they see the benefits of collectively agreeing the overall level of growth, the broad spatial distribution of that growth, infrastructure requirements and aspirations for place-making at a strategic level. All five city/district councils will be formally asked to agree each decision-making stage of the plan-making process, including the final adoption stage. Officers from each council are jointly overseeing the procurement and production of this assessment of Oxfordshire's Growth Needs to support the Oxfordshire Plan.

¹ Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council and West Oxfordshire District Council

7. The city and district councils are already planning for 100,000 new homes in Oxfordshire between 2011 and 2031 as established by the Oxfordshire Strategic Housing Market Assessment (SHMA) and subsequently embodied in the Oxfordshire Housing and Growth Deal. Existing and emerging Local Plans collectively make provision for this level of growth and allocate specific sites for new development as necessary. The Oxfordshire Plan will build on the foundations set by the existing and emerging Local Plans, taking account of existing commitments and proposals.
8. The Oxfordshire Plan will focus on strategic planning issues and does not seek to replace local plans. It will:
 - Set out an overarching spatial strategy for development in Oxfordshire to 2050;
 - Identify the number of new market and affordable homes that will be needed to 2050;
 - Identify broad locations for further strategic-scale development based upon an understanding and appreciation of the environmental quality and natural capital of Oxfordshire; the implications of global climate change imperatives; the housing and community needs of Oxfordshire; and the needs of the economy; and
 - Identify the strategic transport and other strategic infrastructure that will be needed to help facilitate, manage and support sustainable growth in Oxfordshire to 2050.

Site allocations and other detailed policies will continue to be established through Local Plans, for example, policies relating to affordable housing, housing mix and densities may be set at the city/district level.
9. An initial public consultation (Regulation 18 - Part 1) for the Oxfordshire Plan took place during February/March 2019 and a 'Call for Ideas' consultation also took place in March/April 2019, which generated suggestions for additional strategic development locations in Oxfordshire. The next formal consultation stage (Regulation 18, Part 2) will include options for the sustainable distribution of housing and employment growth in Oxfordshire.
10. The timetable for the Oxfordshire Plan is currently being reviewed. An indicative timetable (subject to agreement by Government) for the next stages of the Oxfordshire Plan is as follows:

Oxfordshire Plan Stage	Proposed Timetable
Further engagement on key technical challenges arising from Reg. 18 Part 1	November/December 2019
Consultation on Spatial Growth Options (including scale and Broad Locations of Growth) (Reg. 18 Part 2)	June/July 2020
Consultation on Submission (Draft) Plan (Reg. 19)	November/December 2020
Submission	March 2021
Examination	June-September 2021 (Subject to Planning Inspectorate)
Inspector's Report	December 2021 (Subject to Planning Inspectorate)
Adoption	March 2022

Aims and objectives of this commission

11. National planning policy requires an assessment of Local Housing Need based on a standard methodology as set out in the PPG. However there are limitations and uncertainties in applying a methodology over such a long timescale when it has been designed on the basis of 10-15 year local plans. For example, forecasting affordable housing need is particularly sensitive to market and pricing fluctuations so it is challenging to forecast over a long timescale to 2050.
12. As such the city/district councils are commissioning this assessment to provide bespoke analysis of the growth needs for Oxfordshire to supplement the Standard Methodology, to inform the preparation of the Oxfordshire Plan and which is capable of satisfying the soundness requirements for Examination.
13. The **aim** of this study is to identify numerical scenarios for sustainable housing and economic growth needs in Oxfordshire over the period 2020-2050 based on consideration of key drivers including the housing market, demography and the economy. Taken together, the scenarios will provide a tool that policy-makers can use when developing policies for the Oxfordshire Plan.
14. There are six **objectives**:
 - (i) To identify a strategic level, long-term, robust and transparent methodology for assessing Oxfordshire's housing needs over the period to 2050, including estimates of the future balance between market and affordable housing.
 - (ii) To provide a detailed commentary (including the baseline position) on Oxfordshire's housing and employment market, including demographics and economy and any other key drivers of housing need and how this may change in the period to 2050.
 - (iii) To identify a range of credible and robust housing need scenarios for Oxfordshire.
 - (iv) To establish an informed understanding of the implications for sustainable housing growth in Oxfordshire, of the Oxford-Cambridge Arc and of any other strategically significant infrastructure and growth strategies, including proposals for strategic growth in other areas which are likely to have a significant impact in Oxfordshire.
 - (v) To identify an appropriate functional economic market area and provide an assessment of employment land requirements.
 - (vi) To advise on how the Oxfordshire Plan should respond to the uncertainty associated with long-term planning for strategic housing and employment provision.
15. Alongside this commission, the councils are also separately commissioning an assessment of Gypsy and Traveller Accommodation and of Boat Dweller Accommodation needs, so outputs are not required to be generated as part of this study. Advice is sought however about how this commission considers other specialist housing needs for different groups in the community (eg older people, people with disabilities, families with children) at an appropriate level for a strategic plan to meet soundness tests.

Scope of this commission

A bespoke approach

16. In preparing a response to this brief, consultants should be mindful that the Oxfordshire Plan, as a Joint Strategic Spatial Plan, is different to a local plan in both its scope and approach, and that it covers a longer time period and a bigger geography than a local plan. It is therefore anticipated that reliance

solely on the conventional type of housing and economic needs assessments used to support local plans alone will not be appropriate.

17. Whilst the Plan needs to comply with statutory/legal requirements and satisfy soundness requirements at Examination, it is expected that a bespoke approach will be required to supplement the Government methodologies for typical local plans and any best practice examples which are emerging from other strategic scale plans. Consultants should set out their proposed model, appropriate methodology and explain key assumptions in their tender submissions.
18. If there are additional elements which are not identified in this brief, but which the consultancy team advise including for Soundness or Legal Compliance reasons, then please set these out and advise on the cost implications.

Requirements

19. It is envisaged that there are four main elements to this commission:
 - a) Market assessment
 - b) Scenarios for sustainable housing growth
 - c) Sustainable economic growth and land requirements
 - d) Proposal for next steps
20. To reflect these different elements of the commission and the requirement for a bespoke approach, the authorities would particularly welcome proposals from consultant teams that draw together expertise from a range of specialists to work collaboratively together where this would help to deliver a robust analysis that responds to the specific context and challenges of growth in Oxfordshire to 2050.

a) Market Assessment (housing and economic land/property) and analysis of market dynamics which are likely to shape how the Plan considers future needs

21. The first part of the commission is to provide an analysis of the current housing and economic property market in Oxfordshire and the dynamics across Oxfordshire sub-markets.
22. This is important as a precursor to the other stages of the commission to provide advice about appropriate models and a proportionate evidence base: There are key factors in the Oxfordshire market which provide important local context to forecasting future housing or economic land needs including: the extreme housing (un)affordability especially in Oxford City; and the historic patterns of focussing growth at a limited number of settlements (the 'county towns' strategy from the former Structure Plan) which has resulted in towns like Didcot and Bicester experiencing large amounts of growth over relatively short timescales in recent years, and the impact on other smaller communities of unplanned growth from sites granted via the appeals process as a result of housing land supply cases ahead of strategic sites delivering.
23. These 'spatial' elements are important to understand in order to provide context to the demographic and economic forecast figures, and to inform the identification of appropriate uplift scenarios to test as reasonable alternatives and will provide context to help to define the spatial options to test through the Plan process.

24. The Market Assessment is likely to include (list not exhaustive):

- i) An up-to-date assessment and analysis of market conditions across Oxfordshire and dynamics between sub-markets.

This should include:

- Consideration of market conditions for residential property including consideration of relevant sub-markets (eg build-to-rent, student accommodation and specialist housing needs accommodation,) as well as any geographical sub-market areas as appropriate.
- Consideration of market conditions for economic property and sectors (eg logistics, high tech). This may be broader than traditional employment uses, to reflect the Oxfordshire market such as the role that research and healthcare play in the economy, as well as any geographical sub-market areas as appropriate.
- Consideration of likely future market trends, recognising:
 - a) that the Oxfordshire Plan covers the period to 2050; and
 - b) the challenges associated with long term economic forecasting.

The assessment of markets should be presented in a way that can be easily utilised in any subsequent assessment of sites or broad areas.

- ii) An assessment of market conditions to deliver additional homes in areas already subject to significant levels of planned housing growth.

Recent Local Plans in Oxfordshire have delivered significant housing growth at the main urban areas including Oxford, Bicester and Didcot. Some of this housing growth has already been built out and some is planned for delivery over the respective Local Plan periods. In some cases delivery will also continue beyond the period covered by adopted and emerging Local Plans. To support the work on the Oxfordshire Plan (in defining scenarios to be tested as part of the plan making process), we are seeking to understand whether the market conditions are likely to be able to support/deliver further strategic scale growth at the main urban areas over the period to 2050. It may be appropriate to consider the period to 2050 in phases.

25. The assessment should also consider how the actual growth in recent years has compared to the levels which were forecast, in particular the forecasts in the Oxfordshire Strategic Housing Market Assessment (SHMA, 2014). In line with Government requirements at the time, the SHMA sets out the overall level of housing need and the mix of housing required for each of the Oxfordshire Districts over the period 2011-2031. The figures that the SHMA arrived at were based on meeting identified housing needs, supporting committed economic growth and improving housing affordability. The SHMA forms a central part of the evidence base for adopted and emerging local plans in Oxfordshire, and the commitments in the Growth Deal, which the Oxfordshire Plan is not seeking to re-consider. Nonetheless whilst those documents set the direction for growth up to 2031 (and slightly beyond for some local plans), it would provide useful context to the Oxfordshire Plan to consider actual growth and changes in affordability for the period 2011 to the present compared to the forecasts, in order to gain insights about the sensitivities and dynamics of the Oxfordshire housing market and economy.

b) Scenarios for levels of housing growth

26. The Government's current approach to defining how many homes to plan for, through the 2019 revisions to the NPPF and the associated Planning Practice Guidance, states that to determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment conducted using the Government's Standard Method, unless exceptional circumstances

justify an alternative approach, which include, but are not necessarily be limited to: current and future demographic trends and market signals; affordability issues; housing to support the Oxfordshire economy; and, the implications of transformative infrastructure investment.

27. This commission requires an Oxfordshire-wide assessment of housing need that is consistent with Government policy as set out in the NPPF and associated Planning Practice Guidance, but which recognises the unique characteristics of Oxfordshire, particularly in terms of the strategic nature and long-term scope of the Oxfordshire Plan, its connectivity and the economy, the affordability issues (high ratios of average house prices to average earnings), and Oxfordshire's position within the Oxfordshire-Cambridge Arc.
28. Historically, modelling for understanding housing need in Oxfordshire has typically been based on an underlying premise that past trends will carry forwards. However this approach means that the projections become less reliable the further into the future the projections are taken, with the longest appropriate time horizon stretching to perhaps 20 years: This presents challenges when planning for a longer plan period to 2050.
29. The methodology for this study must therefore go beyond simply continuing past trends and recognise that future growth in Oxfordshire's will not necessarily look to continue current patterns and rates of growth. The city/district councils require an innovative and bespoke approach that provides an effective understanding of housing need over the long-term, and that does not simply assume that present policies (local or national) will necessarily continue in the future. This approach will need transparency in the model and its assumptions, in order to understand and interrogate different potential influences and sensitivities which would shape future trends.
30. The requirement for this commission is for a methodology that produces estimates of housing need for Oxfordshire (as a whole) for 10-year periods (eg. 2020-2030, 2030-2040, and 2040-2050).
31. It is anticipated that as a minimum the assessment will include three scenarios (or sets of scenarios):
 - (i) **Demographic-based:** The starting point for this scenario should be the official ONS trend-based population and household projections, and an understanding of likely changes in Oxfordshire's demography based on future influencers and sensitivity testing of factors such as migration. The analysis should include consideration of the extent to which assumptions within the 2016-based sub-national demographic projections align with local trends in Oxfordshire, and the implications (if any) of the ONS 2018-based national population projections (or other updates if published during the period of the study).
 - (ii) **Economic-based:** The starting point for this scenario should be the economic forecasts produced by the Oxfordshire LEP to inform Oxfordshire's Local Industrial Strategy (2019) (available from the LEP). These scenarios run to 2040. They do not quantify the numbers of homes that will be needed to support forecast economic growth. The study should consider these forecasts alongside other economic forecasts (including the commissioning of any bespoke economic forecasts that the consultants feel appropriate,) and take a view as to which forecasts should underpin this scenario of housing-need. This element of the study will need to consider a range of matters including the relationship between productivity and numbers of jobs, and what the long-term relationship between numbers of jobs and numbers of homes might look like in Oxfordshire as a result of factors including technological advances during the Plan period.
 - (iii) **Affordability-based:** There are major issues with housing affordability in Oxfordshire and a significant need for affordable housing. The study should use an approach that considers the long-term relationship between housing supply and affordability and the specific dynamics of the

Oxfordshire market, to create a bespoke approach to supplement the short-term approach set out in Government guidance.

32. The proposal should also set out any additional scenarios that they consider would reflect Oxfordshire's particular circumstances and that should be tested as reasonable alternatives through the Plan process, together with how this would be approached. In the context of various strategic nationally-significant infrastructure investments (recent and planned) in Oxfordshire, one additional scenario could be the implications for housing need of transformative levels of strategic infrastructure investment.
33. The proposal should clearly explain the confidence levels that can be attached to the different scenarios of housing need and (if necessary) how these vary over the time-period for the Oxfordshire Plan, the likely estimates of sensitivity to different variables, and any data limitations.

c) Economic growth and land/property requirements

34. Just as the previous section identified that there are challenges in forecasting housing needs for the long term which require a bespoke approach, it is anticipated that the Oxfordshire Plan also needs a bespoke approach to considering how much economic growth to plan for, and how much land for employment should be provided to deliver the growth.
35. The proposal will need to consider economic growth levels for the Plan period. This section will need to be aligned with the assumptions applied in the scenarios about housing need. It should also take into account the Local Industrial Strategy forecasts and consider the rapid expansion of key sectors in recent years including where jobs growth has exceeded the forecasts in the SHMA and the Strategic Economic Plan. Wider economic influences will also need to be considered, including the role of Oxfordshire in the Oxford-Cambridge Arc and other important locations and transport routes. This analysis will help to inform what levels of economic growth should be planned for in Oxfordshire and the key challenges to delivering the growth. The proposal should clearly explain the confidence levels that can be attached to the different scenarios of economic need and (if necessary) how these vary over the time-period for the Oxfordshire Plan, the likely estimates of sensitivity to different variables, and any data limitations.
36. Building on the market assessment undertaken in part (a) the commission will need to undertake a more detailed review of the Oxfordshire market and market signals, informed by local data and market intelligence. The specific requirements of strategically-important business sectors in Oxfordshire are changing and are likely to continue evolving during the Plan period, for example the types of location and types of premises that are needed to attract and retain businesses. Advice is sought as to what the key locational and premises requirements are for those businesses that are likely to be strategically significant, and how the Plan can provide strategic employment land for changing requirements. (Note that local plans would continue to make provision for local scale employment land, this commission is not seeking actual locations to be identified).
37. It is anticipated that OxLEP will help to facilitate access to market intelligence from the business community (or representatives of businesses eg agents), and in providing background research/evidence about the specific nature of the economy and businesses in Oxfordshire as part of this commission, to supplement the information provided in the LIS.

38. The commission will also need to consider the existing provision of employment land as per adopted/emerging local plans and gains/losses through planning applications, to inform the scenarios about need and future demand for new strategic scale employment land which would be needed to support economic growth during the plan period. This should be in for 10-year periods (eg 2020-2030, 2030-2040, and 2040-2050) for Oxfordshire (as a whole), however it may be that certain strategic economic sectors have locational requirements or characteristics specific to that sector, in which case commentary should be provided.

d) Quotation for facilitating follow-on workshops and other related work

39. Following completion of the assessment, it is envisaged that the city/district councils will need to take forward the findings of the report by appraising the scenarios for levels of growth and identifying an appropriate level of growth to deliver through the Plan policies.

40. It may be that the consultants could provide a facilitation role to support the councils in those discussions/workshops (with officers and/or members as applicable) and help to provide technical insights about the data and analysis that has informed the report. As such the proposals should include an estimate of additional fees (for example per workshop,) for subsequent work related to this commission, as well as the costs of additional fees for supporting the councils at Examination if required.

Context and further considerations

Other local evidence

41. In addition to the official ONS data from Government, and any new modelling undertaken to inform this commission, the study should take into account the existing relevant evidence that supports the adopted and emerging local plans in Oxfordshire, and the Oxfordshire Local Industrial Strategy produced by the LEP, particularly where the timescales of those plans or strategies overlap, as well as any other evidence which is considered most relevant as advised by the councils.

Mitigating potential conflicts of interest risks

42. It is acknowledged that multi-disciplinary consultancies may be working (or have recently worked) on commissions within or related to the Oxfordshire area, such as those related to local plans or planning applications. As such all proposals should declare any known projects (past or upcoming) where it could be interpreted that there is a conflict of interest with this commission and should set out how the risks will be mitigated to ensure professional integrity and robustness of this study on an ongoing basis.

Outputs & Deliverables

43. The section sets out the key outputs and deliverables which are expected:

A report setting out:

- A commentary on the key drivers of housing need in Oxfordshire.
- Identification of the exceptional circumstances, or wider considerations, that exist in Oxfordshire which justify an alternative approach to the Standard Methodology.

- A methodology for assessing Oxfordshire's housing needs over the period 2020-2050 based on consideration of housing market, demographics, economic factors, affordability, and any other key drivers.
- The minimum number of homes that are needed in Oxfordshire over the period to 2050 using the Government's Standard Methodology as set out in the NPPF 2019.
- The implications of each set of exceptional circumstances, for levels of housing need in Oxfordshire to 2050. The outputs should also relate to the 10-year periods used in the modelling (eg 2020-2030, 2030-2040 and 2040-2050).
- How the evidence may be drawn together to arrive at a set of needs-based scenarios.
- A commentary on the strengths and weaknesses of each of the scenarios.
- A commentary on any overlap between the scenarios and what implications this has (if any) for the numerical outputs.
- A commentary about the dynamics of the key economic sectors in Oxfordshire, the requirements of businesses, and the levels of employment land provision needed to 2050 for Oxfordshire.

The report should include the rationale underlying each of the above and a record of the other studies and research that have been drawn on.

44. General requirements for the commission overall:

- Draft report/chapter(s) to be provided in MS Word format;
- Final complete report of all chapters to be provided in MS Word and in PDF format;
- Any supporting spreadsheets should be in MS Excel format; and
- Relevant digital material, infographics and collateral which can be used on social media, online and digital platforms where appropriate.
- Where new spatial data is created, this should be supplied in .shp or geodatabase format in addition to any report outputs.

45. Reports must:

- Present information in a clear, concise format and utilise plain English so as to be as accessible as possible to those without specialist knowledge;
- Include a non-technical executive summary;
- Utilise an appropriate, robust methodology capable of withstanding scrutiny at Examination; and
- Clearly set out the methodology used and any assumptions applied with clear references to data sources.

46. If there are additional outputs beyond those in this brief, which the consultancy team advise including for Soundness or Legal Compliance reasons, then please set these out and advise on the cost implications.

47. The city/district authorities shall hold copyright of all presented material. The city/district authorities shall be able to distribute the material in part or whole to any organisation or individual it determines, at no extra cost, and any proceeds of sales will belong to the city/district authorities. The quoted costs should be inclusive of all data.

Timetable

48. Set out below are the key milestones which consultants will need to consider as part of their proposals. Given the ambitious timetable for producing the Oxfordshire Plan, adherence to this timetable will be critical.

Key Milestones	Timeline
Inception meeting	Inception w/c 9 th December
Progress updates	Frequency to be agreed at the inception meeting
Agree methodology	Early January 2020
Market analysis - draft	Mid/late January
Supplementary modelling/forecasting – draft headline findings report	Mid/late January
Presentation to Heads of Planning – draft emerging findings	Heads of Planning meeting (31 Jan)
Draft headline conclusions report	Late February
Presentation to Heads of Planning - draft headline conclusions and potential implications	Heads of Planning meeting (6th March)
Final draft report for review	Early April 2020

49. The appointed consultant will be responsible for producing their own detailed programme for carrying out the work and for completion of stages by key dates to be agreed at the inception meeting. This programme should include a detailed, step-by-step timed plan describing the methodology, specific tasks, responsibilities and estimated time/resources to complete each step, including costings.

GDPR – Schedule of Processing, Personal Data and Data Subjects

50. The Supplier shall comply with any further written instructions with respect to processing by the Council.

51. Any such further instructions shall be incorporated into this Schedule.

Description	Details
Subject matter of the processing	Engagement with agents and businesses may involve the gathering and use of personal data.
Duration of the processing	The assessment is due to be completed by April 2020
Nature and purposes of the processing	The commission may include engagement with property agents and businesses
Type of Personal Data	The type of personal data likely to be gathered and used in this commission includes names, personal and work contact details (such as postal address, telephone number and email address).
Categories of Data Subject	The data subjects are property agents.
Plan for return and destruction of the data once the processing is complete UNLESS requirement under union or member state law to preserve that type of data	Personal data is not to be retained once the commission has been completed. No personal data will be included within the report.

Schedule 1: Submission of tender proposals

Quotations must be submitted in accordance with the following instructions and conditions. Suppliers that do not comply with these instructions or conditions may have their Quotation rejected.

The councils reserve the right to disqualify any submission which is deemed incomplete.

Please answer all the questions in English, as accurately and concisely as possible, or mark those not applicable 'N/A' and provide an explanation.

The response boxes will expand to accommodate your answers but if necessary continue on a separate sheet where space / layout on this form is restrictive but please ensure you are within any requested word count for your response.

Please answer every question. Do not assume that the officers evaluating the quotation will know about your organisation or the work that you do, answer the questions as fully as possible within any given constraints.

The councils reserve the right not to accept the lowest or any quotation and to annul the Request for Quotation process and reject all quotations at any time prior to contract award, without thereby incurring any liability to the applicants.

In order to simplify this process, you should not provide supporting documents, for example, accounts, certificates, statements or policies unless specifically requested to do so. The councils may ask to see these documents at a later stage so it is advisable that you ensure they are made available upon request. You may also be asked to further clarify your answers or to provide further details.

All communication with the councils must be made via the South East Business Portal.

The indicative timetable for this procurement is:

Stage/activity	Date
RFQ published	12 th November 2019
Deadline for receipt of clarification questions or request for additional information from Tenderers	28th November
Deadline for receipt of tenders	9am 2 nd December
Interviews	5 th / 6 th December
Contract award	w/c 9 th December

The closing date for receipt of the completed Request for Quotation is **9am Monday 2nd December 2019**. Responses must be uploaded via the South East Business Portal.

Please note that the councils will not consider late returns.

Suppliers shall keep their quotations valid and open for acceptance by the Council until the expiry of 90 days from the date for return of quotations.

Please ensure that all the Appendices are completed and returned.

Tenderers shall not make any alterations, qualifications, additions or notes upon the text of the Contract Terms and Conditions except with the prior written consent of the Council.

Evaluation of tender proposals

The evaluation of submissions will be based upon two stages:

- selection criteria; and
- award criteria.

Those submissions that pass the selection criteria will then be evaluated against the award criteria. Those deemed not to meet the selection criteria requirements will not be considered further.

Suppliers should note that regardless of a quotation's overall merits, in the event that evaluating officers (acting reasonably) consider there to be a fundamental weakness which is likely to impact adversely upon the supply of the goods and/or services, then grounds will exist to exclude the bid from further consideration.

Ref:	Selection criteria	Assessment
1.	Financial standing*	Pass / Fail
2.	Insurance^	Pass / Fail
3.	Modern Slavery Act 2015	Info Only

*Financial standing takes into consideration a supplier's credit score, the estimated value of the contract, and the supplier's turnover. Any supplier who does not achieve a credit score of at least 81 and/or whose minimum yearly turnover is not at least twice the estimated value of the contract may be subjected to a more detailed assessment as to their financial standing. Any supplier who provides less than satisfactory accounts/figures or documentation which therefore give rise to concerns that cannot be satisfied regarding their financial standing, will fail.

^Suppliers must have in place the levels specified or be willing to have the levels stated if they are successful on being awarded the contract.

The following award sub-criteria and their weighting for the quality aspect of the tender review will be used to evaluate the tenders received and select a supplier to award the contract to.

Ref:	Award criteria	Weighting
AC1	Understanding of the brief	10%
	Quality of the proposed methodology/approach to the study	20%
	Relevant information to inform the study	10%
AC2	Relevance and quality of previous experience	10% (5% per case study)
AC3	Quality, experience and availability of staff	10%
AC4	Social Value	5%
	Qualitative Total	65%
	Price	35%
Overall Total		100%

The scoring framework below will be used to evaluate submissions. The potential supplier's response to each question will be scored and the total pro-rated to give a percentage score out of the maximum percentage for that section.

0 Unacceptable	Nil Response, or Proposal is so incomplete or irrelevant that it is not possible to form a judgement
1 Poor	Almost unacceptable, response is limited or proposal is inadequate or substantially irrelevant.
2 Unsatisfactory	Below expectation, proposal does not fully address the requirement and gives rise to a number of concerns about its potential reliability.
3 Satisfactory	Satisfactory, proposal generally meets requirements, gives minor reservations about meeting some of the requirements.
4 Good	Good, meets expectations, proposal provides detail that is directly relevant, gives confidence as to reliability to meeting all key aspects of the requirements.
5 Excellent	Comprehensive, proposal exceeds expectations, gives high confidence that all key aspects of the proposal may be relied upon without reservation, offers added value and innovation that is relevant to requirement.

The final scores for the qualitative and price elements of the tender will be combined to give an overall final score for the submission.

Financial criterion scoring system

Each submission will be awarded a weighting based on its relationship with the lowest priced quotation on the basis of the submitted lump sum fee. The quotation with the lowest lump sum fee will be awarded the full weighting available. Each of the remaining submissions will be awarded a weighting on a pro-rata bases according to the following calculation:

$$\frac{\text{Lowest quotation price}}{\text{Potential supplier price}} \times 35 \% \text{ of weighting to be allocated}$$

Worked example:

Potential supplier	Lump sum price (£)	Pro rata weighting (based on 40% being allocated to the price criteria)
A	£70,000	35%
B	£80,000	31%
C	£100,000	25%

If a potential supplier is successful in its bid the fee submitted as part of this tender will form part of the contract.

Fees are to remain fixed for the duration of the contract.

Acceptance of Quotation

Unless otherwise stated, any contract or order placed as a result of this Invitation to Tender will be on Oxford City Council's Standard Terms and Conditions of Contract.

The successful supplier's submission together with relevant information will be binding and will form part of the contract together with this document.

Appendix A – Suppliers Response to the Statement of Requirements

1. Please provide a brief history and outline of your organisation (maximum 500 words).

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2. Please complete the table below detailing turnover for the last two financial years.

Financial year:	Total annual turnover (£)	Profit (as % of turnover before tax)
Company name and registered address:		
Company registration number (if applicable):		

3. Please provide details of all insurance cover currently in force.

Insurance cover required:	Insurer	Policy No	Cover (£)	Renewal Date
Public Liability Min £5m				
Employers Liability £5m				
Professional Indemnity £2m				

If your organisation does not currently hold the required insurance cover, please confirm that you would be willing to have the levels stated if you were successful on being awarded the contract.

Yes / No

4. Requirements under the Modern Slavery Act 2015:

4.1	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")? Which means do you operate at all within the UK with a turnover in excess of 36M	YES/NO
4.2	If you have answered yes to question 1 are you compliant with the annual reporting – please provide the relevant URL to view full statement	YES/NO URL:

AC1 Please provide details of how you propose to meet the requirements outlined in the specification and deliver the project requirements.

40% - max word count 2000 words

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AC2 Please provide TWO case studies detailing current contracts (within last 5 years) of a similar nature or previous experience to include: (Score 5% per Case Study Word Count 1000 each)

Case Study 1 5% - max word count 1000 words

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Case Study 2 5% - max word count 1000 words

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AC3 Please provide a statement indicating the resources available to you to support this contract and the qualifications, experience and availability of staff.

10% - max word count 1000 words

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AC4 Oxford City Council will seek to engage with providers who will be able to promote and deliver to the economic, social and environmental well-being of the City as part of the contract, as covered under the Public Services (Social Value) Act 2012.

Please demonstrate where your organisation is able to meet Social Value considerations as part of the wider impact of goods, works or services, giving specific details of what will be delivered in line with this contract.

5% - max word count 500 words

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Pricing

Please insert your fixed quotation price for the entire duration for the proposed contract **excluding VAT**. Please ensure that you have broken down the pricing to include all supplies/services/works required and any additional costs in proving the Service and include any added value such as early payment rebates.

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Additional information required

In addition to the Construction Industry Scheme (CIS), the Council has an obligation to comply with the Intermediaries Legislation, commonly known as IR35. The Council is responsible for identifying and determining which contractors fall within the scope of IR35. In making a decision the Council will consider the information provided by the contractor and will refer to guidance published by HMRC and apply the HMRC assessment tool as necessary.

Where services or works are being provided the following information must be supplied.

Question	Possible answer	✓
Which option best describes how the service/works will be delivered.	By one individual	
	If one individual, is there a substitute?	
	By more than one individual	
	Some of all elements will be outsourced	
	If Yes, please specify:	
Please confirm the employment status of anyone who would be working on the proposed contract.	Self-employed	
	If Yes, please provide your Unique Tax Reference No.	
	Employed and subject to PAYE	
	Other - please specify	
	No	

Appendix B - Declarations

As a public sector body the Council has a number of obligations. Please tick the boxes with which you comply below and sign to confirm.

	✓
Please confirm that you have not canvassed or solicited any member, employee or agent of the Council in connection with this quotation.	
If the service/works are being delivered from within Oxfordshire, please tick to confirm that your employees are paid in excess of the Oxford Living Wage: (For the year 01/04/2019 – 31/03/2020 this is £10.02 per hour.)	
Please confirm that you have not colluded with any other person (person, body or association corporate or incorporate) in relation to this quotation.	
Please confirm that the information supplied in this document is accurate and complete and that no gift or offer of a gift or consideration as an inducement or reward has been made to any member, employee or agent of the Council.	
The Council is subject to freedom of information requests under the Freedom of Information Act 2000. Please confirm that if you consider any of the information in this quotation to be of a sensitive nature you have advised us of such sensitivity and the reasons for its sensitivity.	
The Council under the Transparency Agenda must publish all spend of over £500 in a single transaction, as well as details of contracts that it holds. Please confirm your understanding that information not exempt from disclosure under the Freedom Of Information Act 2000 is not confidential information.	
Please confirm that your organisations directors or any other person who has powers of representation, decision of control has not been convicted of conspiracy, corruption, the offence of bribery, fraud, money laundering or any other offence within the meaning of Article 57(1) of the Public Contracts Regulations 2015.	

Organisation name:	
Contact name:	
Signed:	
Position:	
Date:	

Appendix C – Confidential Information Statement

We the undersigned, understand that we are allowed access to confidential information belonging to Oxford City Council ("Council") in order to prepare our quotation for the Contract. This may include personal information under the terms of General Data Protection Regulation (GDPR) (EU) 2016/679

This information will be kept secure at all times while in our possession. Only those staff within our organisation that are required to see the information in order to prepare the quotation, are to be given access to the information.

The information will not be used for any purpose, other than for which it is being supplied.

No part or parts of the information will be retained once the quotation has been submitted, save as that required to be retained for audit and compliance purposes. The recipient will retain the minimum confidential information that is required for the audit and compliance purposes and will treat such information with the same degree of care as we exercise for our own confidential information.

The Terms of this Agreement will also be applied to any other organisations, such as sub-contractors or consultants, who may work with us to provide information to prepare the tender.

Should any breach of the above take place, we will immediately notify the Council's Chief Technology & Information Manager by emailing dataprotection@oxford.gov.uk.

Company name:	
Signed:	
Name:	
Position:	
Date:	