

**Connected Places Catapult**

**Invitation to Tender**

**UK Retrofit data discovery**

**Tender Reference Number: CPC2020017**

**Closes at 12 noon**

**on 01/10/2020**

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# SECTION 1 - INTRODUCTION & BACKGROUND

## **Company background & information**

Connected Places Catapult is the UK’s technology and innovation centre for mobility and the built environment, harnessing emerging technologies that enable new levels of physical, digital and social connectedness. We are here to support business growth on three key areas covering net zero carbon, the levelling up agenda and post pandemic places – to create jobs and generating long-term impact and economic growth.

We will help sell UK capability on the global stage, while also promoting the UK as a superb test bed. With a clear emphasis on collaboration, we are bringing together diverse organisations across different sectors, breaking down barriers and providing a unique platform for meeting the world's most pressing challenges.

Connected Places Catapult is one of an elite network of not-for-profit technology and innovation centres established and overseen by the UK’s innovation agency, Innovate UK.

**Vision**

The Connected Places Catapult is driven by the vision that connection is what drives innovation in placemaking: connected citizens, communities, public and private stakeholders; connected infrastructures and systems; connected data and information; connected languages and standards.

The exponential evolution of digital technology is delivering the tools to create these truly and comprehensively connected places fit for the future wellbeing of people, the environment, as well as infrastructure and economies.

It is our role at the Connected Places Catapult to help bring all the actors to the table, and to help them discover the opportunities and urgencies that together we can collectively manifest for the good of ourselves, those around us, and all those on to whom we will pass the future.

## **Approach**

This Invitation to Tender (ITT) is being issued to support the delivery of a retrofit data discovery (referred to hereafter as the products and services) to be provided to Connected Places Catapult (CPC)

The objective of this ITT is to provide sufficient information for Respondents to:

* Understand CPC requirements and proposed procurement approach
* Understand the scope and nature of the products and service that they will contract to provide
* Assess their ability in bidding to provide this service
* Provide agreement and/or feedback on proposed approach to the management and governance of this service
* Provide agreement and/or feedback on proposed contractual terms and commercial approach
* Develop and price a proposed solution based on current available information in the format specified

Respondents’ compliance with the requirements and submission in the required format will enable CPC to carry out a fair and thorough evaluation of the responses. Please see section 2 for details of the instructions. Failure to comply with these instructions will invalidate the Respondents submission.

The Respondents attention is drawn to the principles and terms set out in Appendix 1.

Each Respondent must perform its own appraisal of all information and data provided by CPC in this ITT. The products and service that form the basis of this document have been documented to the best of CPC’s knowledge and are not warranted.

**Section 2 – TENDER PROCESS AND INSTRUCTIONS**

* 1. **Summary Contract Details**

|  |  |
| --- | --- |
| Contract description | Undertake a discovery into retrofit data to gain an understanding of the current state of data for housing retrofit.  Part 1:  This seeks the provision of data and user insights, in order to answer the following research questions:   * what data do retrofit stakeholders currently use and what problems and limitations do stakeholders find with retrofit data * what are the gaps between what data is available and what is required and what are the barriers to obtaining this (e.g. commercial, technical)   Part 2:  The second part is to:   * develop ideas for how data related user challenges may be solved, including approaches to filling gaps in data * creating a set of use cases that show the value in solving these challenges and the opportunities for innovation and scaling up of retrofit * developing a roadmap of interventions |
| Contract period | 14th OCTOBER 2020 – 18th December 2020 |
| contact point | **raj.ragiwala@cp.catapult.org.uk** |
| closing date | 1st October 2020, 12 Noon |

* 1. **Definitions**

|  |  |
| --- | --- |
| Closing date | The closing date for the submission of tenders being:**12 Noon 1st October 2020** |
| Contract | The contract will be entered into by CPC and the successful tenderer. |
| contract period | The duration of the contract will be: 9 weeks |
| most economicallyadvantageous | The tender which CPC has evaluated as demonstrating the best value for money, taking into account both price and quality of service. |
| services | The services and/or product to be supplied by the supplier under the contract |
| Supplier(s) | The tenderer(s) selected will enter into a contract with CPC |
| Tender | The proposal submitted by a potential supplier. |

## **Introduction**

## This ITT refers explicitly to the supply of a retrofit data discovery. This project is funded by CPC and is in support of a CPC delivery milestone ‘Enable innovators in housing to undertake agile opportunity analysis and aggregate demand to commercial scales by publishing an industry roadmap for a national housing typology/ data model.’

To achieve net-zero by 2050, the UK needs to reduce carbon emissions from the housing stock to zero. This requires reducing energy demand to the maximum possible and decarbonising what remains. The UK must retrofit 27 million existing homes to a very high standard of energy efficiency over the coming decades. Technologies exist to deliver these retrofits but are not being deployed with the necessary speed and scale. CPC is working with the industry to overcome the barriers to scaling up retrofit.

## In February 2020, CPC published a report ‘[Retrofit: Towards A Sector-Wide Roadmap 2020 - Report supporting net-zero housing by 2050’](https://s3-eu-west-1.amazonaws.com/media.cp.catapult/wp-content/uploads/2020/01/30170148/HIP-Retrofit-Towards-a-Sector-Wide-Roadmap-%E2%80%93-2020-WEB.pdf) .

## The report tackled two key questions:

## What needs to be true for housing owners to invest in deep retrofit?

## What changes are needed by suppliers to help them develop and deliver solutions?

Four key action areas emerged that would help both buyers and sellers of retrofit solutions including:

## Development of a deeper understanding of the existing housing stock to find the best solutions

## Creation of replicable, integrated interventions – the ‘retrofit kit’

## Explore mass customisation of standard solutions to fit our diverse housing stock

## Creation of a finance platform to create standardised contracts and to match projects and funders

What we heard from stakeholders was that a lack of detailed information about the UK housing stock is a barrier to developing and applying retrofit solutions. They said that they need accurate information on all properties: building type, construction, history, and performance. Together with building modelling it would allow rapid selection and testing of retrofit strategies, and an estimate of costs and benefits. It would help buyers find the best approach for their specific property and would help suppliers decide where to focus their efforts to develop new components and solutions.

We also heard that many data sources already exist, but they do not meet the needs of buyers and sellers. They are neither integrated nor complete. What this project aims to therefore tackle is to get a greater understanding of the problem space around housing retrofit data, to allow us to then fully explore solutions.

## **Project brief**

## The primary aim of this contract is to identify opportunities for better use of retrofit data in order to support innovation and the scaling of retrofit including understanding the following:

## the housing retrofit data ecosystem

## the information needs of retrofit stakeholders

## data related challenges faced by retrofit stakeholders

## the gap between what is currently available and what is required

## identify solutions for addressing this gap and the retrofit data challenges

## create use cases and show the benefit of meeting these needs

## create a roadmap of actions

## During the project, the contractor will be expected to:

* **Conduct user research** with retrofit industry stakeholders to understand their data needs and challenges. What data they currently use, the limitations of that data, any access issues, and what data does not yet exist or is not openly available.
* **Mapping of housing stock data** through user research and desk research. What data exists, what data is used, who the data producers and consumers are, who owns it, and how it is accessed/licensed? Identifying specific barriers and challenges to delivering the requirements of stakeholders.
* **Develop use cases** that show the value in addressing barriers to retrofit data. These should identify opportunities created by increasing quality/availability/integration of housing stock data, and how this would support innovation and scaling up of retrofit. The use cases can be illustrated where relevant with high level designs/wireframes, to support communicating these ideas with key stakeholders.
* **Develop data principles and roadmap**
  + a set of principles that define ingredients for effective retrofit data in response to user needs
  + A roadmap that defines the actions that are needed to address user-needs, including suggestions for cost-effectively filling data gaps.
* **Budget**
  + the overall Budget allocated for this piece of work is **£45,000 excluding VAT**

## **Support provided by CPC**

## CPC will support the contractor by engaging with stakeholders we have been working to support the recruitment for user research and stakeholder engagement as well as making available relevant internal research.

## CPC will be undertaking analysis of SME’s that are innovating with retrofit data in order to develop a set of case studies to present opportunities in data innovation, which will be made available to the contractor.

## CPC will also be responsible for delivery of dissemination of the work including hosting a public webinar in collaboration with the contractor and other stakeholders.

## **Tender Submission**

## All documents submitted as part of your tender must be written in English and sent to Connected Places Catapult.

## An electronic copy of the Respondents proposal should be submitted through the portal below.

## <https://procontract.due-north.com/Register>

Responses will not be opened until the closing time and date for receipt of tenders. Please do not leave your tender submission until the final deadline as tenders received late will not be considered.

* 1. **Respondent enquiries and clarification**

The Respondents will be able to raise clarification questions. All questions concerning the tender must be made in writing via email and must reference the tender page number and section number. Questions should be concisely stated and be numbered in sequential order.

Questions must be submitted by 12 noon Thursday 24th September 2020 via the portal <https://procontract.due-north.com/Register>

Questions will be responded to within two days of receipt, by circulation of anonymised responses to all Respondents.

**Any approaches to other members of staff, direct or otherwise in direct relation to this tender will result in exclusion from this process.**

## **Respondent responses**

Respondents are invited to respond to this ITT by submitting a detailed bid that addresses all the requirements set out in this document.

Each response should be submitted in the name of the Respondent who will be entering into any resultant contract with CPC. The bid must apply from the closing date for ITT bid submission and be valid for a period of twelve months. CPC may require the Respondent to extend the validity of its bid at any time prior to the contract award.

* 1. **Post-Submission Clarifications**

During the evaluation period, the Connected Places Catapult reserves the right to seek further information from the tenderers to assist in its consideration of the tenders; this may take the form of post-submission clarification meetings or written clarifications.

* 1. **Award Criteria Summary**

|  |  |  |
| --- | --- | --- |
| **CRITERIA** | **WEIGHTING** | **DEMONSTRATED BY** |
| **Price** | **30%** | Price submitted by tenderer where the lowest cost tenderer shall receive 30% and all other scores shall be allocated according to their difference from the lowest price, using the formula.  30% x [lowest price of all tenderers/tendered price.] |
| **Quality** | **70%** | Each criterion will be marked using a scale of 0-5 (as referenced in section 4:2) |

* 1. **Quality Criteria**

Tender responses for quality criteria will be evaluated according to the table set out below.

Tenderers must enter their response to the below evaluation criteria in Appendix 3.

|  |  |
| --- | --- |
| **CRITERIA** | **SCORING (%)** |
| Approach to the delivery of this project | 40% |
| Track record of running agile user centred discovery projects in line with GDS Standards | 20% |
| Experience in data science / data engineering including running data discovery projects | 20% |
| Sector knowledge: Demonstrate good knowledge of the retrofit sector and key stakeholders. | 10% |
| Managing stakeholder relationships, including examples of engaging with government departments, industry and SMEs | 10% |

* 1. **Presentation**

Depending on the quality of submissions, a potential shortlist of Respondents (top 3 scoring organisations) may be invited to make a presentation to introduce their company and present their tender response.

Connected Places Catapult will provide guidance where it considers it appropriate to do so to each Respondent ahead of this presentation as to any specific queries or issues to be covered in respect of that specific Respondents proposal.

Specific dates, times for presentations will be advised later in the selection process and if possible, notified at least a week in advance. For now, Respondents should assume a one-hour slot, with formal presentations for around thirty minutes followed by questions and answers.

For each Respondent the senior manager that would be responsible for the contract is required to attend the presentations.

|  |  |
| --- | --- |
| **ACTIVITY** | **DATE** |
| **ITT Issue -** ITT issued to respondents | 17/09/2020 |
| **Bidder Question –** all questions via the portal | 12 noon 24/09/2020 |
| **Respondents Proposals** - CPC to receive responses to ITT | **12 noon on 01/10/2020** |
| **Evaluation of Proposals -** Review, score and evaluate proposals, including a credit check of potential suppliers. | By 06/10/2020 |
| **Shortlist respondents & inform all respondents of results of selection process i.e.: successful and unsuccessful** | 07/10/2020 |
| **Respondent Presentations -** Respondent presentations of proposals (if required and only the 3 top scoring organisations will be invited) | 09/10/2020 |
| **Tenderer Selection** – Review and recommend preferred tenderer | 12/10/2020 |
| **Management and / or Internal Board Approval** | 13/10/2020 |
| **Contract Awarded** | 14/10/2020 |
| **Contract Commences** (with respondent fully accountable for ongoing service) | 14/10/2020 |
| **Contract completion** | 18/12/2020 |

* 1. **Legal Information**

The contractual terms are set out in Appendix 1. The duration of the contract is 3 months.

Tenderers may propose minor amendments to the contractual terms attached. If tenderers wish to seek clarification in relation to any provision of the contractual terms, they should do so by asking a clarification question and submitting that question accordingly. Tenderers should note that responses to clarification questions may be provided to all tenderers.

1. **SECTION 3 - CANCELLATION PROCESS**
   1. **Right to Cancel**

Connected Places Catapult reserves the right to terminate the tender process. This ITT does not represent a commitment to enter into any contract.

* 1. **Right not to award a contract**

Connected Places Catapult reserves the right to reject all tenders if none, in its opinion, adequately satisfies the requirements, or if Connected Places Catapult’s circumstances change. In such circumstances Connected Places Catapult may subsequently issue another ITT.

* 1. **Right to Part award a contract or to multiple suppliers**

Connected Places Catapult reserves the right to part award where some of the requirements are met and to more than one supplier where appropriate.

* 1. **Costs**

**Respondents shall bear all costs associated with the preparation and submission of their tender and CPC shall not be responsible or liable for any costs or expenses regardless of the outcome of the procurement process.**

* 1. **Confidentiality**

All communications issued by Connected Places Catapult to respondents must be treated as strictly confidential. Respondents shall not release details of such communications other than on an “In Confidence” basis to those who have a legitimate need to know or whom they need to consult for the purpose of preparing their tender. Under no circumstances may Respondents release any information concerning such communications for publication in the press or on radio, television, screen or any other medium. The content of the tender and the details of the evaluation of the proposals will remain confidential to Connected Places Catapult and its advisors who will comply with all relevant legislation. Should Respondents wish that any information supplied by them as part of this process not be disclosed because of its commercial sensitivity or confidentiality or otherwise, they must, when providing this information, clearly identify the specific informationthey do not wish to be disclosed and clearly specify the reasons for its sensitivity.

Please note that it is not sufficient to include a statement of confidentiality encompassing all the information provided in the response.

1. **SECTION 4 – TENDER EVALUTION PROCESS**
   1. **Tender Evaluation Process**

The evaluation process will follow the below stages:

Stage 1: Receipt and Opening

Stage 2: Compliance Check

Each tender will be checked for compliance with the requirements of the ITT. Tenders which are not substantially complete or which are non-compliant with the ITT may be excluded from further participation in the evaluation process or, at the Catapult’s discretion, tenderers may be asked to provide clarification. In the case of the latter, a failure by the tenderer to provide a satisfactory response within the deadline specified in the request for clarification may result in disqualification from the evaluation process.Connected Places Catapult reserves the right to evaluate tenders before declaring them non-compliant.

Stage 3: Evaluation of Tender Responses

Price and quality evaluation will be carried out in accordance with the published evaluation criteria.

Stage 4: Score Review

Review of quality and price scores

Stage 5: Final Evaluation Report and Recommendation

A final evaluation report will be completed, recommending award.

* 1. **Marking Scheme**

|  |  |
| --- | --- |
| **0-5** | **USING A 0-5 MARKING SCHEME** |
| 0 | Unacceptable Response – No information provided or response does not address the requirements. |
| 1 | Poor Response- The response contains material omissions and/or is supported by limited evidence/examples. Major concerns that the tenderer has the potential to deliver/that they have failed to meet a reasonable standard. |
| 2 | Fair Response – The response contains some omissions and/or is not well supported by evidence/examples. Some concerns about the tenderer’s ability to deliver/that they have failed to meet a reasonable standard. |
| 3 | Good Response – There is adequate detail/supporting examples giving a reasonable level of confidence in the tenderer’s experience and ability. The tenderer appears to have the potential to deliver as required/has met a reasonable standard and there are only minor concerns about the tenderer’s experience. |
| 4 | Very Good Response – The level of detail/supporting examples gives a high level of confidence in the tenderer’s experience and ability. The tenderer clearly has the potential to deliver and/or has clearly met an acceptable standard. |
| 5 | Excellent Response – A comprehensive well evidenced submission, clearly demonstrating expertise and knowledge incorporating value added benefits/social value attributes and other points of innovation. The response is deemed to offer little or no risk and fully captures the understanding of the steps involved to deliver the aspects of the question posed, giving a very high level of confidence in the tenderer’s experience and ability. |

**Appendix 1: TERMS AND CONDITIONS**

This contract will be on Connected Places Catapults standard terms and conditions and any special terms and conditions in respect to the lease of devices.

Please find attached as a separate document.

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# Appendix 2: SPECIFICATION

Connected Places Catapult, presents an exciting opportunity to be part of our Housing Innovation programme by delivering an important discovery project that could be a key enabler in unlocking the housing retrofit market in the UK and an essential part of delivering net zero by 2050.

Successful applicants will be working with the CPC Built Environment Team and their network of retrofit stakeholders from government and industry to help deliver a key output of CPC’s housing programme.

**We are looking for a partner to deliver:**

## A discovery into retrofit data that identifies opportunities for better use of retrofit data in order to support innovation and the scaling of retrofit including understanding the following:

## the housing retrofit data ecosystem

## the information needs of retrofit stakeholders

## data related challenges faced by retrofit stakeholders

## the gap between what is currently available and what is required

## identify solutions for addressing this gap and the retrofit data challenges

## create use cases to show the benefit of meeting these needs

## create a roadmap of actions and retrofit data principles

## During the project, the contractor will be expected to:

* **Conduct user research** with retrofit industry stakeholders to understand their data needs and challenges. What data they currently use, the limitations of that data, any access issues, and what data does not yet exist or is not openly available.
* **Mapping of housing stock data** through user research and desk research. What data exists, what data is used, who the data producers and consumers are, who owns it, and how it is accessed/licensed? Identifying specific barriers and challenges to delivering the requirements of stakeholders.
* **Develop use cases** that show the value in addressing barriers to retrofit data. These should identify opportunities created by increasing quality/availability/integration of housing stock data, and how this would support innovation and scaling up of retrofit. The use cases can be illustrated where relevant with high level designs/wireframes, to support communicating these ideas with key stakeholders.
* **Develop data principles and roadmap**
  + a set of principles that define ingredients for effective retrofit data in response to user needs
  + A roadmap that defines the actions that are needed to address user-needs, including suggestions for cost-effectively filling data gaps.
* **Budget**
  + the overall Budget allocated for this piece of work is **£45,000 excluding VAT**

# Appendix 3: RESPONSE TO QUALITY EVALUATION CRITERIA

Tenderers must use the template below for their response to quality evaluation criteria. Responses in any other format will not be accepted.

|  |  |
| --- | --- |
| Criterion | **Retrofit Data Discovery Delivery**  Please outline how you would implement the project |
| Response  (1000 words excluding Gantt chart). Max Marks 40% |  |
| Criterion | **Experience –** describe your experience of running agile user centred design projects in line with GDS Standards |
| Response  (500 words). Max Marks 20% |  |
| Criterion | **Data expertise –** describe your experience in data science / data engineering including running data discovery projects |
| Response  (500 words). Max Marks 20% |  |
| Criterion | **Housing retrofit awareness**  Please describe what experience you have had working in the housing retrofit sector and the key challenge facing the sector. |
| Response  (500 words). Max Marks 10% |  |
| Criterion | **Sector knowledge**  Please describe your knowledge of the retrofit sector and key stakeholders. |
| Response  (500 words). Max Marks 10% |  |

# Appendix 4: PRICING SCHEDULE

Please provide a breakdown of your pricing and include a total excluding VAT.