Invitation to Tender

Quickfire Guide

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You must offer unrestricted and full direct access to the Procurement Documents on the internet. This must:

- include the Invitation to Tender (ITT) documents
- be available from the date of publication of a **Contract Notice.** (only in the case of an open procedure). For all other procedures you must provide sufficiently precise information)
- be non-discriminatory and free of any charge.

Where it is justified that the ITT documents cannot be issued electronically, other transmission means can be used. However the time limit for receipt of tenders should be increased by 5 working days (except in a case of duly substantiated emergency). Examples are the use of specialised tools and/or files.

Where a two-stage process is being used, the documents should be made available only to the tenderers which have passed the selection stage of the procedure.

For the following procedures:

- **Restricted Procedure**
- **Competitive Dialogue Procedure**
- **Innovation Partnership**

- **Competitive Procedure with Negotiation**

An invitation to submit bids must be issued simultaneously and in writing to selected bidders.

For the Open Procedure, ITTs must be issued on request to any bidder at any point prior to the date set for submission of tenders.

The ITT should include comprehensive information for potential suppliers about the requirement being tendered.

Checklist

Checklist

Information to Include in your Tender

Go to Checklist Links to content

There will be some generic information/documents that require insertion into all tender packs e.g. a reference to the relevant Contract Notice or Award Criteria weightings. However, some content is contract specific e.g. to Invitations to Confirm Interest. You should select those applicable to include in your invitation pack.

This checklist gives example information/criteria that could be included in your invitation.

Evaluation Criteria

Open or close

The questions within the ITT must be consistent with the evaluation criteria and weightings published within the Contract Notice and procurement documents.

You should also draft a timetable for the process which must comply with applicable minimum timescales detailed in Public Contracts (Scotland) Regulations 2015. For more information refer to **Selection**, **Award** & **Exclusion** criteria.

Price/financial evaluation criteria should include:

- whole life cost comparisons
- quantifiable financial benefits arising from the technical evaluation (e.g. speed, fuel or electricity consumption, coverage, shelf life, etc.)
- fixed or variable pricing
- cost of components, spare parts, consumables and servicing
- Life-cycle costing where appropriate
- Risk analysis and financial appraisal (for major contracts of strategic importance, especially those of an innovative nature)

Whilst developing the documentation you will draw information from the Developing Strategy stage of the Procurement Journey.

The evaluation criteria in the ITT must be agreed with the User Intelligence Group (UIG). The criteria will identify which of the eligible tenderers will deliver best value for money based on the Most Economically Advantageous Tender.

You must identify the Most Economically Advantageous Tender on the basis of the Best Price Quality Ratio. This will be assessed on criteria linked to the contract subject matter and must include the price or cost using a cost effectiveness approach. A cost effectiveness approach may include Life Cycle Impact Mapping.

Further Inclusions for ITT Documentation

Open or close

You may also wish to consider the areas below for inclusion within the ITT documentation:

- e-Commerce (Found Below): eCapability ITT section / ITT - Appendix X - eProcurement Information / **E Auctions**
- contract and supplier management information
- proposed implementation plan
- management information
- roles & responsibilities
- key performance indicators (KPIs)
- mini-competition guidance: details of process to be followed for call offs

Buyers can ask for the most updated list of organisations for each of the worksheets on Appendix X.

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Open or close

The ITT or the Invitation to Confirm Interest should include comprehensive information for potential bidders about the requirement being tendered. While there are a number of generic documents listed below that will require insertion into all packs (e.g. a reference to the relevant Contract Notice or Award Criteria weightings) some of the content will naturally be specific to each requirement and you should select those that you need to include in the ITT pack from the list below:

- a reference to the relevant Contract Notice, previously published
- Instructions to bidders including the tender submission deadline, address to which the tender submission is to be sent and the language which the tender submission must be submitted in
- you must issue an SPD to bidders. For more information, please refer to **Selection Criteria** and **SPD**
- award Criteria weightings
- for services contracts, if deemed applicable, you should ask the bidders to indicate any share of the contract that they may subcontract and information about the subcontractors including their name and contact details. You may request separate SPD responses from subcontractors and consortium members when deemed appropriate, in order to safeguard the effective delivery of the contract, based on relevance and proportionality to the contract
- For contracts which may be extended (i.e. that are not retendered), the nature, quantity and, where possible, the estimated time for exercising options
- The nature, quantity and, where possible, estimated publication dates of notices of future tenders
- The type of procedure e.g. a Restricted Procedure or Competitive Procedure with Negotiation procedure, etc.
- If applicable to the contract, the delivery of supplies, commencement or termination date(s)
- The address of the Organisation who will award the contract
- Economic and technical conditions, financial guarantees and information required from tenderers

- The form of the contract to be used e.g. purchase, lease, hire, hire-purchase, or a combination
- If electronic access to the relevant Procurement Documents cannot be offered the address and deadline date for requesting procurement documents and the language(s) to be used
- Background and overview of the tendering and evaluation process including details of presentations and site visits, if applicable
- Terms and Conditions which will apply to any resulting contract with the principal supplier
- Specification and technical requirements
- Sustainable Procurement Duty requirements
- Cyber Security Requirements (refer to the **Guidance Note on Supplier Cyber Security**)
- Community Benefit requirements (consideration of which is mandatory in contracts valued equal or greater to £4M, although inclusion in all contracts/frameworks is recommended)
- Quality Questionnaire

The activities at this stage must be carried out in a carefully managed manner that support the **Principles of Procurement**, It is the responsibility of you and your Organisation to make sure these requirements are met.

e-Capability ITT Section

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Route 3 - Appendix X - eProcurement

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