

## Our Future Health

### Invitation to Tender (ITT)

Title: Cloud Infrastructure, Trusted Research Environment, and Researcher Billing

Procurement Reference Number: OFH-CITRERB-20220303

Procurement Procedure: Open

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## 1. Background

Our Future Health is issuing this Invitation to Tender (“ITT”) for the purpose of inviting proposals for the provision of Cloud Infrastructure, Trusted Research Environment and Billing services as described in the Specifications in documents 2, 3, 4, 5 and 6.

The overarching aim of Our Future Health is to help people live healthier lives for longer through better prevention, earlier detection and improved treatment of diseases. The aim is to speed up the discovery of new methods of early disease detection, and the evaluation of new diagnostic tools, to help identify and treat diseases early when outcomes are usually better. The ambition is to recruit up to 5 million adults from across the UK to create a diverse and inclusive cohort of people who have consented to participate in the research. Our Future Health will be the UK’s largest ever health research programme, bringing people together to develop new ways to prevent, detect and treat diseases. For further information about Our Future Health please refer to [Our Future Health](#).

Enquiries regarding this tender must be directed through the dedicated email address which is [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com).

## 2. Tender Documents

#	Document Name	Description	Response Required (Y/N)
1	Our Future Health - Invitation to Tender - FINAL 3 March 2022	Invitation to tender for the Our Future Health Cloud Infrastructure, Trusted Research Environment, and Researcher Billing. Document included the instructions to tenderers	No
	<b>Specification Documents</b>		
2	Our Future Health Cloud TRE Cross Lot Requirements - FINAL 3 March 2022	Contains requirements that are relevant to all Lots of this procurement.	No
3	Our Future Health Lot 1 Requirements - FINAL 3 March 2022	Contains requirements for the Lot 1 Cloud Infrastructure.	No
4	Our Future Health Lot 2 Requirements - FINAL 3 March 2022	Contains requirements for the Trusted Research Environment service.	No
5	Our Future Health Lot 3 Requirements - FINAL 3 March 2022	Contains the requirements for the Researcher Billing service.	No

6	Our Future Health - TRE Demonstration Instructions - FINAL 3 March 2022	Contains the instructions for the demonstrations which will be carried out during the procurement by the bidders.	No
	<b>Technical Questionnaire and Price Documents</b>		
7	'Our Future Health - Selection Questionnaire (Bidder Information & Mandatory Questions) - FINAL 3 March 2022'	Contains mandatory questions, grounds for exclusion, selection questions and required declarations bidders must include when completing this.	Yes
8	'Our Future Health - Section 6 (Technical and Professional Ability) of Selection Questionnaire - FINAL 3 March 2022'	Contains the mandatory 'must have' questions relating to Section 6 ('Technical and Professional Ability') of the Selection Questionnaire above.	Yes
9	'Our Future Health - Lot 1 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 1 to be completed by the tender deadline.	Yes
10	'Our Future Health - Lot 2 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 2 to be completed by the tender deadline.	Yes
11	'Our Future Health - Lot 3 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 3 to be completed by the tender deadline.	Yes
12	'Our Future Health - Lot 1 Pricing Template - FINAL 3 March 2022'	Pricing tables to be completed by bidders submitting a tender for Lot 1.	Yes
13	'Our Future Health - Lot 2 Pricing Template - FINAL 3 March 2022'	Pricing tables to be completed by bidders submitting a tender for Lot 2.	Yes
14	'Our Future Health - Lot 3 Pricing Template - FINAL 3 March 2022'	Pricing tables to be completed by bidders submitting a tender for Lot 3.	Yes
	<b>Terms and Conditions</b>		
15	'Lot 1 Our Future Health Cloud Infrastructure Draft Terms and Conditions'	Draft terms and conditions for Lot 1 Cloud Infrastructure Terms and Conditions.	No

16	'Lot 2 Our Future Health TRE Draft Terms and Conditions'	Draft terms and conditions for Lot 2 Cloud Infrastructure Terms and Conditions.	No
	<b>Other Documents</b>		
17	'Our Future Health - Glossary of Terms - FINAL 3 March 2022'	Glossary of terms relevant to this ITT and the Requirements Documents.	No

### 3. Lotting Structure

This procurement is divided into three Lots:

- Lot 1 Cloud Infrastructure
- Lot 2 Trusted research environment
- Lot 3 Researcher billing

The bidding and award rules for each Lot are set out in this ITT in the *Evaluation Criteria and Methodology* section.

Whilst the services are divided into 3 Lots, Bidders cannot bid for Lot 3 requirement as a standalone Lot. Bidders may bid for:

- Lot 1 individually
- Lot 2 individually
- Lot 1 and Lot 3
- Lot 2 and Lot 3
- Lot 1 and Lot 2 and Lot 3

All bids will be evaluated on a per Lot basis.

### 4. Contract Term

The initial contract term for all contracts will be three (3) years, with the option to extend on two (2) occasions in twelve (12) months increments.

### 5. Response Requirements

In order to bid for these contracts Bidders are required to respond to the specific questions and submission requirements provided in this ITT and the relevant requirements documents (documents 2, 3, 4, 5 and 6). These questions and submission requirements are split between selection and award questions. The selection questions and submission requirements relate to economic and financial standing, and technical and professional ability.

You must follow the commercial model and pricing matrix guidance in Section 10 and complete Documents 12, 13 and 14 to provide the cost of the Cloud Infrastructure, Trusted Research Environment and Billing services. Details on the evaluation criteria and methodology that will be used can be found at Section 10.

## 6. Instructions to Bidders

Please read the instructions on the tendering procedures carefully. Failure to comply with them or to return any of the required documents or information may invalidate your tender.

Please use the following email [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com) if you have any doubts as to what is required, or you have difficulty in providing the information requested. Pre-tender negotiations are **not** allowed.

### 6.1. Bidder Clarification/Further Information

You may submit any queries that you have relating to this ITT, by no later than 17:00 on the 15 March 2022. Please submit any queries via the email address [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com). Bidders should note that clarification questions and requests for further information received by any other means will not receive a response.

Any queries should clearly reference the appropriate paragraph in the documentation and, to the extent possible, should be aggregated rather than sent individually. As far as is reasonably possible, Our Future Health will respond to all reasonable requests for clarification of any aspect of this ITT and supporting documents in accordance with the following paragraph, provided they are received before the required deadline as detailed in Section 6.1. No queries received after this deadline will be answered.

Answers to questions received by Our Future Health will be circulated by email to all Bidders other than any that have made a “no bid” notification by 18 March 2022. All questions and their answers will be circulated to all bidders (without revealing the identity of the individual bidder that put forward a particular question).

Where Bidders consider that a question or request and/or the response is commercially confidential, that question or request must be indicated “Commercial in Confidence” and Bidders should specify, where possible, such redactions as would render the question or request and any response non-confidential. Our Future Health will consider the request for confidentiality. However, Our Future Health reserves the right, at its sole discretion, to act in what it considers to be the best interests of a fair procurement process. Where any question or request, or Our Future Health’s response thereto, contains information that should, in the interests of a fair procurement process, be disseminated to all Bidders, Our Future Health shall be free to disseminate such information to all Bidders, with or without any amendments proposed by a Bidder. Before doing so, Our Future Health will inform the Bidder of its intention to do so and offer the Bidder the opportunity to withdraw the question or request before such dissemination. Where a Bidder does not respond within 5 days of being informed, Our Future Health are permitted to assume that the Bidder is content for the response to be issued to all Bidders.

On no account are Bidders to contact or communicate with **any** person involved in work concerning this ITT, or any employee of Our Future Health, about any aspect of this tendering exercise other than through the dedicated email account. Failure to comply with this requirement could result in disqualification from this procurement.

## 6.2. No bid notification

If having read the Specifications you decide not to submit a Bid, we would be grateful if you could please inform us, ideally including your reasons (though you are under no obligation to do so). Please send this information via the email address [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com) marked “No Bid”.

## 6.3. Bid Deadline

Bidders must submit their Bid by 12:00 (noon) 28 March 2022.

Bidders must submit their Bid via the email address [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com). Bids submitted via any other route / method may be rejected at the sole discretion of Our Future Health.

Failure to submit a Bid by the deadline and in the required format may disqualify a Bidder from this procurement.

## 6.4. Format of Bid

All files that have been used to create the Bidders’ answers to Documents 7, 8, 9, 10, 11, 12, 13 and 14 must be submitted by Bidders in the formats specified in the table below:

File Type	Software Package
Text based documents	Adobe Acrobat PDF, or alternatively Microsoft Word HTML (Version 2010 compatible)
Spreadsheet based documents	Microsoft Excel (Version 2010 compatible)
Project programme files	PDF or Excel format (if Microsoft Project used, please print to PDF)
Graphics files	Microsoft PowerPoint (Version 2010 compatible)
Reports and accounts	Adobe Acrobat PDF or Microsoft Word HTML (Version 2010 compatible)
Documents on which a signature is required (Declarations)	Scanned and reproduced in Adobe Acrobat PDF or Microsoft Word HTML (Version 2010 compatible) with an electronic signature

Bidders should name each of the documents in the Bid in the following format:

“[insert Bidder name] – [Insert Document name]”

Failure to provide the Bid in the required format may lead to a Bidder’s Bid being set aside without evaluation and the Bidder’s exclusion from further consideration in this procurement.

## 6.5. Consortia Bids

In the case of a Bidder consisting of a consortium of more than one legal entity, that consortium will be treated as a single Bidder for the purposes of this procurement, except that each member of the consortium must complete and sign a completed Part 1 and Part 2 of the selection



questions, Declaration of Consent, Contract Confirmation Declaration and Conflicts of Interests Declaration.

If you are bidding on behalf of a group (consortium) or you intend to use sub-contractors, you must provide a response to the selection questions in the Our Future Health Selection Questionnaire (Bidder Information & Mandatory Questions) on behalf of the consortium and/or any sub-contractors (as if references to “the Bidder” were references to the consortium member). The Bidder should provide a single combined response to the award questions.

Bidders should note that Our Future Health may require an unincorporated consortium or joint venture to form a legal entity immediately prior to award of any contract, or alternatively, where a contract is to be entered into with each of the consortium members, each member will be required to undertake joint and several liability.

## **7. Procurement Process and Guidelines**

### **7.1. General**

This procurement is being conducted under regulation 27 of the Public Contracts Regulations 2015 (as amended) as an Open procedure.

Bidders are requested to submit Bids for the whole service for each relevant Requirement, as detailed in Documents 2, 3, 4, 5 and 6.

Bidders must comply and ensure that their Bid response complies with the provisions set out in this Section 7. Any Bid which fails to comply with the provisions of this ITT and any amendments and/or supplementary information issued subsequent to it, may be disqualified and the provisions of Section 7.12 shall apply.

Our Future Health reserves the right, at its sole discretion, to reject any Bidder that fails to comply fully with the requirements of the process set out in this document, or which makes any misrepresentation in supplying any information requested.

### **7.2. Specific Bid Requirements**

All Bids shall be in English, and all prices should be quoted in Pounds Sterling exclusive of VAT. Supporting documents should be in English or, alternatively, accompanied by an English translation.

All mandatory sections of the bid documents must be completed. Our Future Health reserves the right to exclude any incomplete bid.

All Bids submitted shall remain valid for acceptance by Our Future Health for a period of three months from the Bid submission date. Submission of a Bid shall be deemed to constitute acceptance of this requirement.

By signing the Declaration of Consent, the Bidder accepts that any selection of a Bidder as the successful Bidder does not constitute a binding agreement or contract unless and until a formal written contract or contracts have been executed, and agrees that, in the event of their selection

as a successful Bidder, the Bidder will complete all necessary steps and execute all documentation as agreed with Our Future Health.

### **7.3. Bidder Eligibility**

By signing the Declaration of Consent, the Bidder warrants that, save as disclosed in writing to Our Future Health, any information supplied by it remains true, and that the Bidder has not, its directors have not, and other persons (if any) having powers of representation, decision or control of the Bidder have not, been convicted of any of the offences listed in Document 7 Selection Questionnaire - Grounds for mandatory exclusion.

If the Bidder makes a misrepresentation in any part of its dealings with, or responses to, Our Future Health such Bidder will be disqualified.

### **7.4. Non-Collusion, Canvassing and Contact**

Any Bidder who, in connection with this procurement:

- enters into any agreement or arrangement with any other person with the aim of preventing Bids being made or as to the fixing or adjusting of the amount of any Bid or the conditions on which any Bid is made;
- offers any inducement, fee or reward to any employee or officer of Our Future Health or any person acting as an agent, consultant or adviser for Our Future Health in connection with this procurement;
- informs any person other than Our Future Health of the amount or the approximate amount of the Bid, except where the disclosure, in confidence, of the amount of the Bid was necessary to obtain quotations necessary for the preparation of the Bid for insurance or for professional advice required for the preparation of the Bid;
- causes or induces any person to enter into such an agreement or arrangement as is mentioned in a), b) or c) above or to provide information about the amount or the approximate amount of any rival Bid;
- commits any offence under the Bribery Act 2010 in connection with this procurement;
- offers or agrees to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done, causing or having caused to be done, any act or omission in relation to any other Bid or proposed Bid;
- canvasses or solicits any other persons referred to in b) above in connection with this procurement; or
- contacts any employee or officer of Our Future Health about any aspect of this procurement, except as permitted by this ITT, will be disqualified (without prejudice to any other civil remedies available to Our Future Health and without prejudice to any criminal liability that such conduct by a Bidder may attract).

Unless expressly permitted, no attempt should be made to contact Our Future Health, or Our Future Health's employees, officers, agents, consultants or advisers as part of this Our Future Health procurement process. Any enquiries made to persons other than through the correct channels may be regarded as prima facie evidence of canvassing.

### **7.5. Confidentiality and Announcements**

This ITT is intended for the exclusive use of the Bidder and is provided on the express understanding that this ITT and the information contained in it, or in connection with it, will be regarded and treated as strictly confidential. This ITT may not be reproduced in whole or in part nor furnished to any persons other than the Bidder save for the purposes of:

- Taking legal and/or professional advice in connection with completing a Bid; and/or
- Obtaining the input from any other parties that will provide information relevant to their Bid, provided that in each case Bidders obtain from such parties prior to such disclosure, confidentiality undertakings of at least equivalent strength to this Section 7.5.

Upon written request from Our Future Health, Bidders shall promptly provide evidence to Our Future Health that such undertakings have been provided.

All Bids received by Our Future Health will be treated as confidential in their entirety and will not be disclosed to any other party. Our Future Health may disclose detailed information relating to Bids to its officers, employees, agents, consultants or advisers where required by the tender process.

Bidders must not make, or permit any person to make, any public announcement concerning this procurement without the prior written consent of Our Future Health (which shall not be unreasonably withheld) except as required by law or any governmental or regulatory authority (including, without limitation, any relevant securities exchange).

### **7.6. Conflicts of Interests**

In order to ensure a fair and competitive procurement process, Our Future Health requires that all actual or potential conflicts of interests are resolved to Our Future Health's satisfaction prior to the submission of Bids. The concept of a conflict of interest includes any situation where relevant staff members, partners, advisers/ consultants or any member of their proposed supply chain have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Bidders should notify Our Future Health of any actual, potential or perceived conflicts of interests (in respect of the Bidder, partners, advisers/ consultants and any member of their proposed supply chain) in their Bid. If the Bidder becomes aware of an actual, potential or perceived conflict of interests following submission of the Bid it should immediately notify Our Future Health. Such notifications should provide details of such actual, potential or perceived conflict of interests.

Without limitation, such conflicts of interests may be perceived by Our Future Health to arise in circumstances where:

- Members of the Bidder's staff, partners, advisers/ consultants or any member of their proposed supply chain are related to officers or employees of Our Future Health; or
- A Bidder (or its advisers/ consultants or any person employed or engaged by it) is potentially providing services for more than one Bidder in respect this procurement process; or

- A Bidder employs or engages, or has employed or engaged, any person currently or formerly employed or engaged by or otherwise connected with Our Future Health, or any other individual who was involved in the preparation or otherwise of another Bidder's response to this ITT.

A conflict of interests shall not be deemed to arise solely by virtue of a person's employment or engagement by Our Future Health. However, Bidders are requested to disclose such relationships to Our Future Health for information purposes only.

Under grounds for discretionary exclusion, Our Future Health reserves the right, at its sole discretion, to exclude at any time any Bidder from the process should any actual or potential conflict of interests be identified but not resolved to the satisfaction of Our Future Health.

The Conflicts of Interests Declaration must be completed and signed.

### **7.7. Bidder Changes**

Bidders are subject to an ongoing obligation throughout the procurement to notify Our Future Health of any material changes in their financial or other circumstances. This includes, but is not limited to, changes to the identity of supply chain members or the ownership or financial or other circumstances and solvency of the Bidder. Our Future Health should be notified of any material changes as soon as they become apparent.

Failure to notify Our Future Health of any material changes or to comply with any of these provisions may lead to a Bidder being disqualified at the sole discretion of Our Future Health (in which case the provisions of Section 7.12 shall apply).

Our Future Health reserves the right, at its sole discretion, to return to any matters raised in the selection criteria, at any stage of the process, to determine whether or not to continue with the evaluation of a Bid, and whether or not to enter into a contract with a Bidder, where circumstances have changed in some material respect.

Any new information provided to Our Future Health will be evaluated in accordance with the selection criteria.

### **7.8. Prior Knowledge of Bidder**

When evaluating Bids, Our Future Health will only consider information provided in response to this ITT.

In compiling their Bid, Bidders should assume that Our Future Health has no prior knowledge of the Bidder, its practice or reputation, or its involvement in existing services, projects or procurements.

### **7.9. Accuracy of Bid Information**

Bidders are responsible for the accuracy of all information submitted within their Bids.

#### **7.10. Changes to the Procurement Process**

Bidders are reminded that Our Future Health, at its sole discretion, reserves the right to vary this procurement process, or to suspend the process, at any time.

Without prejudice to the generality of Section 4, Our Future Health reserves the right, at its sole discretion, to:

- Change dates and times for each stage of the procurement process set out in Section 4; and
- Modify any aspect or stage of the procurement process itself and/or to introduce additional steps or stages into the procurement process.

Our Future Health shall notify Bidders by e-mail of any such changes.

Should Our Future Health elect to suspend this procurement process, instructions will be issued to Bidders regarding the expected duration of the suspension and other relevant matters.

Our Future Health reserves the right, at its sole discretion, to issue amendments or modifications to this ITT at any time before the Bid submission date. These will be issued by e-mail and Bids will be assumed to take account of any such modifications and amendments. It shall be each Bidder's sole responsibility to ensure that they have understood all of the requirements, instructions and information issued under this ITT. No additional time in relation to Bid submission deadlines will be granted following notification of any such amendments or modifications unless Our Future Health shall expressly notify the Bidders in writing otherwise.

#### **7.11. Disclaimer**

Our Future Health reserves the right, at its sole discretion, to change the basis of, or the procedures (including the timetable) relating to, the procurement process, to reject any, or all, of the Bids, not to invite a Bidder to proceed further and not award contracts for the service.

Our Future Health shall not be obliged to appoint any of the Bidders, and Our Future Health reserves the right not to proceed with the procurement, or any part thereof, at any time.

Under no circumstances will Our Future Health be liable for any costs or expenses incurred by a Bidder arising directly or indirectly from the procurement process or termination or suspension thereof, including, without limitation, any changes or adjustments made to the procurement process or documentation (see Section 7.10) or disqualification of a Bidder (see Section 7.12).

Nothing in the ITT and supporting documentation is, nor shall be relied upon as, a promise or representation as to any decision by Our Future Health in relation to this procurement. No person has been authorised by Our Future Health, or its employees, officers, agents, advisers or consultants to give any information or make any statement not contained in this ITT otherwise than as described in this ITT, and, if such other information or statement is given or made, it shall not be relied upon as having been so authorised.

The information contained in the ITT and supporting documentation is presented in good faith and does not purport to be comprehensive or to have been independently verified.

Neither Our Future Health nor any of their employees, officers, consultants, agents or advisers make any representation or warranty as to, or accept any responsibility or liability (except in the case of fraud or fraudulent misrepresentation) in relation to, the adequacy, accuracy, reasonableness or completeness of information which has been, or which is subsequently, made available to any Bidder in connection with this ITT, orally or in writing or in whatever media.

Bidders must take their own steps to verify the accuracy of any information which they consider relevant and are not entitled to rely on any statement or representation made by Our Future Health or any of their advisers.

Bidders considering entering into a contractual relationship with Our Future Health should make their own enquiries and investigations of Our Future Health's requirements beforehand.

The subject matter of this ITT shall only have contractual effect when it is contained in the express terms of an executed contract.

#### **7.12. Disqualification of Bidders**

Bidders acting in contravention of the provisions set out in the ITT or any other information provided by Our Future Health may, at Our Future Health's sole discretion, be disqualified from further participation in this procurement (without prejudice to any other civil or legal remedies available and without prejudice to any criminal liability which such conduct by a Bidder may attract).

Our Future Health reserves the right to exclude Suppliers who fail the Our Future Health Selection Questionnaire from the rest of the Bidding process and their Bids (including TRE demonstrations) shall not be evaluated.

For the avoidance of doubt, disqualified Bidders will be excluded from any further participation in this procurement process and in no circumstances will Our Future Health be liable for any costs or expenses incurred by the disqualified Bidder as a result, directly or indirectly, of such disqualification.

#### **7.13. Bidders' Advisors**

Bidders will be responsible for obtaining all information and independent advice that they consider necessary for the preparation of their respective Bids. Bidders must make their own independent assessment of the procurement after making such an investigation and taking such professional advice as they deem necessary.

#### **7.14. Sub-Contractors**

Where a Bidder intends to use sub-contractors, it will be the responsibility of the Bidder to provide all supply chain members with all necessary information (subject to the provisions relating to confidentiality at Section 7.5 above).

### 7.15. Costs and Expenses

All Bidders shall be responsible for all costs incurred by them in connection with all stages of this procurement.

### 7.16. Intellectual Property

The ITT pack remains our property. You must use the ITT only for this competition. Our Future Health will copy, amend and reproduce your bid to enable us to run the competition and comply with law and guidance.

### 7.17. Contract Terms and Conditions

Our Future Health and the selected Bidder/s will sign the contracts, using Our Future Health Terms and Conditions. Draft terms and conditions are provided as documents 15 and 16. Lot 3 Terms and Conditions are included in the Lot 1 and Lot 2 draft contracts. These will be amended as needed before contract signature.

Our Future Health reserves the right, at its sole discretion, not to select a Bidder to take forward to contract award, or where a Bidder has been selected, not to award a contract.

## 8. Procurement Timetable

The timetable for this procurement is set out in the table below.

Our Future Health must receive all Bids by the Bid submission date and time.

Our Future Health reserves the right to change this timetable at any time. Bidders will be informed if changes to this timetable are necessary.

Bids after the Bid submission date may be rejected by Our Future Health to ensure that all Bidders are treated fairly. The decision whether to reject a Bid received after the Bid submission date is made entirely at Our Future Health's discretion.

Stage	Date
Contract Notice submitted to the 'Find a Tender Service' (FTS) and ITT made available online	4 March 2022
Clarification period for questions/requests for information starts	4 March 2022
Clarification period ends	17:00 on 15 March 2022
Final responses to clarifications	18 March 2022
Bid submission date	28 March 2022 at 12:00pm UK time
ITT Bid evaluation of written responses	29 March – 4 May
TRE Demonstration	Bidders for Lot 2 will be contacted on 29 March 2022 to schedule demonstrations in April 2022
Review completed and selection of successful Bidder	16 May 2022

Notification to Bidders (award decision notice)	17 May 2022
Standstill period	18 - 27 May 2022
Contract start	30 May 2022

## 9. Instructions on completing the Questionnaires

Questions in the Selection and Award Questionnaires require full written and specific responses from Bidders. There may also be specific guidance for Bidders for some questions, as to what should be included in their responses. Again, Bidders are encouraged to read this guidance carefully before completing their responses to the questions.

Bidders must answer all questions in Document 7 and 8. Bidders submitting a tender for Lot 1 must answer all questions in document 9. Bidders submitting a tender for Lot 2 must answer all questions in document 10. Bidders submitting a tender for Lot 3 must answer all questions in document 11. Bidders must also ensure they submit any relevant and referenced additional or supporting information and completed schedules. In particular, Bidders should ensure that their Bid contains a Declaration of Consent, Contract Confirmation Declaration and a Conflicts of Interests Declaration in the form included in the Our Future Health Selection Questionnaire, signed by an Authorised Signatory.

Bidders should submit a full, concise response to all of the award questions. Bid responses are not permitted to cross-refer to responses to other questions, and each question will be evaluated on a standalone basis.

Where a question asks the Bidder to provide a copy of any other document, that document should be included separately in the Bidder's Bid and should be clearly named by reference to the relevant question number, and the Bidder's response to that question should clearly cross-refer to that document.

In completing their response to the questions, Bidders should provide their response in the box provided for each question. Boxes may be expanded to allow responses to fit.

The inclusion of general marketing and company literature or any separate statement of reasons for selection is not required and will not be considered in the evaluation of Bids. Bidders should not include in their Bid any information beyond that requested in this ITT.

If bidding for all three lots, bidders are asked to complete a Bulk Discount pricing template to demonstrate any additional discounts that can be offered if the Bidder is successful in winning all three Lots. Bulk discounts will not be evaluated as part of the competition.

## 10. Evaluation Criteria and Methodology

### 10.1. Must Have Criteria for Selection

Each Supplier must show that they meet the "must have" criteria prior to proceeding to further evaluation. The Suppliers will demonstrate their ability by completing 'Our Future Health - Section 6 (Technical and Professional Ability) of Selection Questionnaire - FINAL 3 March 2022' and 'Our



Future Health - Selection Questionnaire (Bidder Information & Mandatory Questions) - FINAL 3 March 2022', providing the response to [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com).

For those Suppliers bidding for Lot 2, once the Supplier has read the documents and feel they can demonstrate their ability to meet the “must have” criteria for Lot 2, the Supplier should e-mail [ourfuturehealth@curshaw.com](mailto:ourfuturehealth@curshaw.com) to receive instructions on how to access data sets and sample code for the TRE demonstration.

Our Future Health reserve the right not to evaluate the Bids that do not meet the must have criteria detailed in 'Our Future Health - Section 6 (Technical and Professional Ability) of Selection Questionnaire - FINAL 3 March 2022' and 'Our Future Health - Selection Questionnaire (Bidder Information & Mandatory Questions) - FINAL 3 March 2022'.

## 10.2. Award Criteria

The Award Criteria for each Lot is described within the following documents:

- 'Our Future Health - Lot 1 Award Questionnaire - FINAL 3 March 2022'
- 'Our Future Health - Lot 2 Award Questionnaire - FINAL 3 March 2022'
- 'Our Future Health - Lot 3 Award Questionnaire - FINAL 3 March 2022'

## 10.3. Weighting

Each lot will be evaluated individually according to a technical evaluation and pricing. The scores will be calculated using weightings as follows:

- Lot 1: 36% price, 64% technical
- Lot 2: 34% price, 33% technical, 33% demonstration, functionality and usability
- Lot 3: 30% price, 70% technical

## 10.4. Technical Evaluation

The Technical Evaluation will be assessed based on the answers provided to questions contained in the Our Future Health Cloud, TRE and Researcher Billing ITT spreadsheet.

Suppliers are required to answer all questions that are relevant to the Lot they are bidding in.

### 10.4.1. Cross Lot Evaluation

The following areas will be evaluated for all Lots. The scores of the Cross Lot Evaluation will be counted towards the total score for each Lot. % of the score attributed to the Cross Lot Evaluation is detailed in sections 10.4.2, 10.4.3 and 10.4.4.

Ref	Section	Weight
1	Lot integration	25%
2	Security and data governance	35%
3	Portability	20%
4	Support & Incident Management	20%
	<b>TOTAL</b>	<b>100%</b>

#### 10.4.2. Lot 1 Technical Evaluation

The following areas will be evaluated for Lot 1. The relative weighting for each Section is also provided in the table below.

Ref	Section / Question	Weight
	Cross Lot Evaluation Questions	19.00%
1	Value added services and discounts	37.00%
2	Public cloud services, data centres, data storage and computation	21.00%
3	Data centres and location	8.00%
4	Hosting of a Trusted Research Environment	10.00%
5	Consulting and Training	5.00%
	<b>TOTAL</b>	<b>100%</b>

#### 10.4.3. Lot 2 Technical Evaluation

The following areas will be evaluated for Lot 2. The relative weighting for each Section is also provided in the table below.

Ref	Section	Weight
	Cross Lot Evaluation Questions	30.0%
1	User interface	15.0%
2	Separation of workspaces	7.5%
3	Cohort browser	7.5%
4	Analytics	12.5%
5	Import, export and Airlock	5.0%
6	Security, architecture and data governance	7.5%
7	User management	2.5%
8	Support	2.5%
9	Evidence of delivery and future proofing	10.0%
10	Option (not evaluated)	0.0%
	<b>Total</b>	<b>100.0%</b>

#### 10.4.4. Lot 3 Technical Evaluation

The following areas will be evaluated for Lot 3. The relative weighting for each Section is also provided in the table below.

Ref	Section	Weight
	Cross Lot Evaluation Questions	30.00%
1	Billing models	30.00%
2	Debt management	5.00%
3	Ease of use	10.00%
4	Security and data governance	15.00%
5	Payment Terms & Finances	10.00%
	<b>Total</b>	<b>100.00%</b>

#### 10.4.5. Technical Evaluation Worked Example

A Supplier bids for Lot 1.

The Supplier is awarded a total of 75% in the Lot 1 Technical Evaluation

Supplier Technical Score calculation:  $\frac{\text{Total Available Technical Eval Marks}}{100\%} \times \% \text{Achieved} = \text{Supplier Technical Score}$

The Supplier's score for the Technical Evaluation is 48 out of 64.

#### 10.4.6. Technical Evaluation Scoring Criteria

Responses to award criteria questions will be scored out of 5, and the scores shall have the following meanings:

Score	Classification	Definition
0	Unacceptable	The response is of unacceptable quality as it: (i) fundamentally fails to address the question or fails to provide sufficient information; or (ii) demonstrates a complete misunderstanding of the relevant section of the Requirements document(s); or (iii) demonstrates an approach / method which is wholly unacceptable or proposes an approach / method which does not demonstrate that it will meet the requirements of the relevant section of the Requirements document(s)
1	Poor	The response is of poor quality as it: (i) provides only limited information; or

		(ii) demonstrates a limited understanding of the relevant section of the Requirements document(s); or (iii) demonstrates an approach / method which is unsatisfactory or proposes an approach / method which demonstrates that it will meet some requirements of the relevant section of the Requirements document(s) but there are major omissions or concerns with respect to delivering the relevant section of the Requirements document(s)
3	Satisfactory	The response is of satisfactory quality as it: (i) provides sufficient and adequate information; and (ii) demonstrates an understanding of the requirements of the relevant section of the Requirements document(s); and (iii) proposes an approach / method which demonstrates that it meets the requirements of the relevant section of the Requirements document(s) in nearly all respects and the omissions or reservations with respect to delivering the relevant section of the Requirements document(s) are minor in nature
4	Good	The response is of good quality as it: (i) provides fully sufficient and more than adequate information; and (ii) demonstrates a good understanding of the requirements of the relevant section of the Requirements document(s); and (iii) proposes an approach / method which demonstrates that it meets the requirements of the relevant section of the Requirements document(s) in all respects and/or exceeds some of the requirements (in terms of increased quality, capacity or efficiencies), with no omissions or reservations with respect to delivering the relevant section of the Requirements document(s)
5	Excellent	The response is of excellent quality as it: (i) provides a comprehensive level of information; and (ii) demonstrates a high level of understanding of the relevant section of the Requirements document(s); and (iii) proposes an approach / method which demonstrates that it meets the requirements of the relevant section of the Requirements document(s) and exceeds most or all of the requirements (in terms of increased quality, capacity or efficiencies), with no omissions or reservations with respect to delivering the relevant section of the Requirements document(s)

### 10.5. Commercial Model and Pricing Matrix

Suppliers must complete the provided sheets for the Lot/Lots they are bidding for. All prices must be provided exclusive of VAT.

#### 10.5.1. Lot 1 Pricing Evaluation

Bidders submitting a price for Lot 1 must complete the Lot 1 Pricing Template.

To complete the pricing, please use the Base Scenario provided in the Our Future Health Cross Lot Procurement Requirements document.

Supplier are asked to submit the following areas (the table indicates which sections are evaluated and which sections are not evaluated:

Section	Comments	Evaluated/ Not Evaluated
Annual Data Storage cost for three years for Base Scenario	The price must be split per annum based on the Base Scenario and should consider any ingress costs.	Evaluated
Annual Data Storage cost for three years for Extended Scenario	The price must be split per annum based on the Extended Scenario and should consider any ingress costs.	Not Evaluated
Description of the cost derivation	Provide background as to how the cost is derived and what assumptions are made.	Not Evaluated
Exit Costs	Exit costs should be broken down by actions to be taken. The supplier is asked to provide a reason for each of the areas.	Evaluated
Bulk Discount price for storage and exit	The supplier is asked to indicate if they are able to provide a bulk discount if they are successful in winning all three lots. Suppliers are asked to demonstrate additional efficiencies that can be offered to Our Future Health by providing services for all three Lots.	Not Evaluated

#### 10.5.2. Lot 2 Pricing Evaluation

Bidders submitting a price for Lot 2 must complete the Lot 2 Pricing Template.

To complete the pricing, please use the Base Scenario provided in the Our Future Health Cross Lot Procurement Requirements document.

Supplier are asked to submit the following areas (the table indicates which sections are evaluated and which sections are not evaluated:

Section	Comments	Evaluated/ Not Evaluated
Annual Licence Cost based on provided scenario	The price must be split per annum based on the Scenario. A description of how the annual cost is derived should be provided.	Evaluated
Annual Third Line Support Cost	The price must be split per annum. A description of how the annual cost is derived should be provided.	Evaluated
Third Party Integration Costs	Provide a breakdown of activities you expect to undertake to integrate into the Lot 1 and/or Lot 3 service provider	Evaluated
Implementation Costs	Provide a breakdown of activities you expect to undertake to implement the Lot 2 Service as per the Outline Implementation plan and the milestones set out in the Our Future Health Cross Lot Requirements.	Evaluated
Exit Costs	Exit costs should include a breakdown of activities you expect to undertake to Exit the Lot 2 service provision.	Evaluated
Professional Services	Bidders are asked to provide a rate card for professional services. Please provide a list of service description, role description and day rate. Examples include, but not limited to, development, design, product management. These will not be evaluated but will be embedded in the contract for use of Professional Services when required.	Not Evaluated

Bulk Discount price for storage and exit	The supplier is asked to indicate if they are able to provide a bulk discount if they are successful in winning all three lots. Suppliers are asked to demonstrate additional efficiencies that can be offered to Our Future Health by providing services for all three Lots.	Not Evaluated
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### 10.5.3. Lot 3 Pricing Evaluation

Bidders submitting a price for Lot 3 must complete the Lot 3 Pricing Template.

To complete the pricing, please use the scenario provided in the Our Future Health Researcher Billing Procurement Requirements document.

Supplier are asked to submit the following areas (the table indicates which sections are evaluated and which sections are not evaluated:

Section	Comments	Evaluated/ Not Evaluated
Annual Researcher Billing cost, based on proposed scenario	The price must be split per annum based on the Scenario. A description of how the annual cost is derived should be provided. Our Future Health recognise that there are a number of different pricing models and so ask Bidders to explain the mechanics behind their proposed model. The Description providing detail of how the cost is calculated will not be evaluated.	Evaluated
Third Party Integration Costs	Provide a breakdown of activities you expect to undertake to integrate into the Lot 1 and/or Lot 2 service provider.	Evaluated
Implementation Costs	Provide a breakdown of activities you expect to	Evaluated

	undertake to implement the Lot 3 Service as per the Outline Implementation plan and the milestones set out in the Our Future Health Cross Lot Requirements.	
Exit Costs	Exit costs should include a breakdown of activities you expect to undertake to Exit the Lot 3 service provision.	Evaluated

#### 10.5.4. Price Calculation

$$\frac{\text{Lowest Bid Price}}{\text{Supplier Bid Price}} \times \% \text{ Available for the Lot Price} = \text{Supplier Price Score}$$

### 10.6. Demonstration

As part of the procurement evaluation, Our Future Health shall conduct an exercise to enable Suppliers to demonstrate the capabilities of their platform. The purpose of this demonstration is to evaluate the functionality, usability and current capabilities of the Supplier's platform in completing test scenarios to ensure that Our Future has confidence in the ability of the Supplier to deliver within the timescale. The demonstration shall cover main TRE features including:

- User interface
- Separation of the workspace
- Cohort browser
- Analytic tools
- Import and export
- User management

This demonstration requirement is described in 'Our Future Health - Lot 2 TRE Demonstration Instructions - FINAL 3 March 2022'.

## 11. Viable Combination of Suppliers

Our Future Health will need to ensure that the combination of Suppliers across the Lots forms a viable combination. A viable combination is a combination of Suppliers for each Lot such that it is known that the Suppliers can deliver an integrated system between them and with Our Future Health within the specified timelines. All Suppliers as part of their tender responses are required to specify which other Suppliers they can integrate with, and (in the case of Lot 2 and Lot 3), which underlying public cloud infrastructure they can integrate with and deploy onto within the specified timeframes. This information will be used to create the viable combination of Suppliers for the award of Lot 1, Lot 2 and Lot 3.

Once each lot has been individually evaluated as per the Technical and Price criteria, Our Future Health will review all viable combinations.

A combination could include:



- The same Supplier for Lots 1, Lot 2 and Lot 3
- The same Supplier for Lots 1 and 3, and a different Supplier for Lot 2. The Lot 2 Supplier has listed the Lots 1 and 3 Supplier, or the underlying public cloud infrastructure that the Lots 1 and 3 Supplier proposes, as having a suitable cloud infrastructure for hosting Lot 2 services within the specified timeframe.
- The same Supplier for Lots 2 and 3, and a different Supplier for Lot 1. The Lots 2 and 3 Supplier has listed the Lot 1 Supplier, or the underlying public cloud infrastructure that the Lots 1 Supplier proposes, as having a suitable cloud infrastructure for hosting Lot 2 and 3 services within the specified timeframe.

Although we ask Lot 1 Suppliers to list TREs available running in their cloud systems (as availability of a range of TREs will be of benefit to us in the future), we do not require that a Lot 2 Supplier be listed by a Lot 1 Supplier in order to be matched within a viable combination.

Each viable combination will then be scored out of 100% by combining the scores the Suppliers received in their individual lots according to the following weighting:

- Score of Lot 1 Supplier in the combination from their original Lot 1 evaluation will be 40% of the score for the combination
- Score of Lot 2 Supplier in the combination from their original Lot 2 evaluation will be 50% of the score for the combination
- Score of Lot 3 Supplier in the combination from their original Lot 3 evaluation will be 10% of the score for the combination

The highest scoring viable combination will be selected as the winning bid/ bids, and contracts will be awarded to the Supplier/Suppliers who are part of that combination. For the avoidance of doubt, this means that being the highest scoring Supplier for an individual Lot does not guarantee that Supplier will be offered a contract. It is the Suppliers who are part of the highest scoring viable combination that will be offered contracts.

It is Our Future Health's intention to award two contracts. If the winning combination contains two different Suppliers, the services within Lot 3 will be included within the scope of Lot 1 or Lot 2 depending on which bidder for Lot 3 also wins Lot 1 or Lot 2. If the same Supplier wins all three Lots, Our Future Health would award one contract covering Lot 1 and Lot 3, and one contract covering Lot 2. Suppliers (whether they win one or both contracts) should be aware that a future competition could result in them working with a different Supplier for the service and so Suppliers should be willing to enter into one or both contracts as independent commitments.

## 12. Debrief

Following Our Future Health's evaluation of the submissions, Our Future Health will provide a debrief to the unsuccessful bidders.

## 13. Terms and Conditions of Contract to be agreed with all suppliers

Our Future Health and the selected Bidder/s will sign the contracts, using Our Future Health Terms and Conditions, as provided in Documents 11, 12 and 13.

Our Future Health reserves the right, at its sole discretion, not to select a Bidder to take forward to contract award, or where a Bidder has been selected, not to award a contract.

## 14. Checklist of documents to be returned

#	Document Name	Description	Response Required (Y/N)
<b>Technical Questionnaire and Price Documents</b>			
7	'Our Future Health - Selection Questionnaire (Bidder Information & Mandatory Questions) - FINAL 3 March 2022'	Contains mandatory questions, grounds for exclusion, selection questions and required declarations bidders must include when completing this.	Yes
8	'Our Future Health - Section 6 (Technical and Professional Ability) of Selection Questionnaire - FINAL 3 March 2022'	Contains the mandatory 'must have' questions relating to Section 6 ('Technical and Professional Ability') of the Selection Questionnaire above.	Yes
9	'Our Future Health - Lot 1 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 1 to be completed by the tender deadline.	Yes
10	'Our Future Health - Lot 2 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 2 to be completed by the tender deadline.	Yes
11	'Our Future Health - Lot 3 Award Questionnaire - FINAL 3 March 2022'	Contains the technical evaluation questions for Lot 3 to be completed by the tender deadline.	Yes
12	'Our Future Health - Lot 1 Pricing Template - FINAL 3 March 2022'	To be completed by bidders submitting a tender for Lot 1	Yes
13	'Our Future Health - Lot 2 Pricing Template - FINAL 3 March 2022'	To be completed by bidders submitting a tender for Lot 2	Yes
14	'Our Future Health - Lot 3 Pricing Template - FINAL 3 March 2022'	To be completed by bidders submitting a tender for Lot 3	Yes