

Corporate Services
Forestry Commission
231 Corstorphine Road
Edinburgh
EH12 7AT
Tel 0131 314 6329
Fax 0131 316 4344
lynne.rennie@forestry.gsi.gov.uk
Admin & Finance Manager
Lynne Rennie

6 February 2012

<Insert bidder Name>
<Insert bidder Address 1>
<Insert bidder Address 2>
<Insert bidder Address 3>
<Insert bidder Postcode>

Dear Sirs

INVITATION TO QUOTE FOR Timber market and statistical support to the Expert Group on Timber Trade and Statistics

REF NO: CFSTEN1/12

You are invited to submit a quotation for the supply of the above to the Forestry Commission.

The following documents form the Invitation to Quote and provide details of our requirement:

- Invitation to Quote (ITQ)
- Statement of Requirement
- Our standard terms and conditions of contract for the supply of services.

You need to complete and return the following items:

- Part A – Organisation and Contact Details
- Part B – Details of Insurance Policies
- Part C – Health and Safety Questions
- Part D – Specific Questions
- Part E– Pricing Schedule

- Part F – Declaration
- Part G – Certificate of Bona Fide Tender

Please send your completed quotation to the address below. Please note that we do not accept fax or email copies.

[Lynne Rennie]
[Corporate Services
Forestry Commission
231 Corstorphine Road
Edinburgh
EH12 7AT]

For further enquiries about this invitation please contact:-

[Lynne Rennie]
Tel: 0131 314 6329
Email: lynne.rennie@forestry.gsi.gov.uk

Please mark the envelope with the initials 'ITQ' for Timber market and statistical support to the Expert Group on Timber Trade and Statistics

REF NO: CFSTEN1/12- Not to be opened until Friday 16 March 2012 at 15.00

We must receive two copies of your completed quote by **Friday 16 March 2012 at 15.00**. We will keep quotes that we receive earlier and not open them until after the deadline. We will not consider any quotes received after the deadline. Please be aware that we may copy your documents, but only for our own use.

All quotes will be evaluated objectively as detailed in the Evaluation Matrix in the ITQ document.

You must follow these instructions:

- Any contract concluded as a result of this ITQ shall be governed by <English> Law and the Forestry Commission's Standard Term and Conditions for the supply of services, and any additional terms specified as attached to this ITQ, will apply. Your terms will not apply.
- Your quote and all accompanying documents are to be in English.
- All prices must be in sterling and exclusive of VAT.
- Costs remain the responsibility of those submitting a quotation.
- We will not return any part of the documents forming your quote.
- We reserve the right to cancel or withdraw from the process at any stage.
- We do not undertake to accept the lowest priced quote, or part, or all of any quote.
- All information supplied to you by us must be treated in confidence and not disclosed to third parties.
- All details of your quote, including prices and rates, must be valid for our acceptance for a period of 90 days.
- Once we have awarded the contract, we will not accept any additional costs incurred which are not reflected in your quote.
- Offering an inducement of any kind for obtaining this or any other contract with us will disqualify your quote and may constitute a criminal offence.
- We have not asked for financial details in this document; however we reserve the right to carry out checks if we think it is necessary.

Yours faithfully

Lynne Rennie

Admin & Finance Manager

Statement of our Requirements

Purpose

1. The Forestry Commission wishes to commission a timber market and statistical support service to assist the Expert Group on Timber and Trade Statistics.

Background

2. The Expert Group on Timber and Trade Statistics advises and assists the Forestry Commission by:

- helping to compile information on the supply and demand of timber and forest products in Great Britain and, where appropriate, for England Scotland, Wales or the United Kingdom;
- assessing the need for information on any aspect of the timber and forest product trade, or trade resources such as labour and machinery;
- commenting on relevant surveys and data released by other sources;
- interpreting information and structural factors affecting market development;
- considering international trade statistics and the impact of the imported timber trade; and
- monitoring development and progress of research associated with these tasks, particularly the development of modelling tools and surveys.

Aims and Objectives

3. The aim of the timber market and statistical support service is to provide additional support to the Expert Group on Timber and Trade Statistics in terms of market intelligence and statistics on timber utilisation and on UK production, imports and exports of timber and wood-based products.

4. Specific objectives are to:

- monitor trends in timber utilisation – contractors are requested to submit proposals for how they plan to achieve this;
- produce the annual UK Timber Market Statement for submission to the United Nations Economic Commission for Europe (UNECE) Timber Committee in September; and
- provide statistical services to the Forestry Commission's Economics and Statistics team on an ad hoc basis as required. This could include work to improve data quality for imports or exports of specific wood products, for example, or work to improve woodfuel statistics. Proposals should be costed on the basis of up to a maximum of five person-days resource required each year for this task, with any requirement for additional resource to be separately agreed with the Forestry Commission, if needed.

5. In addition, the contractor will be expected to attend and participate in meetings of

the Expert Group on Timber and Trade Statistics (EGTTS), reporting on progress and providing expert advice where relevant. There are three meetings each year, held in Silvan House, Edinburgh, in April, August and November. The first EGTTS meeting that the contractor will be expected to attend will be on 26 April 2012.

6. The contract will run for three years, from 23 April 2012 to 31 March 2015, with an option to extend for a further two years, to 31 March 2017.

Timetable

7. The timetable for 2012-13 (with similar timetables for the following years).

| | |
|--|----------------------------------|
| Submission period | 10 February 2012 – 16 March 2012 |
| Contract award | 16 April 2012 |
| Initial meeting with Forestry Commission, if required | April 2012 |
| EGTTS meeting(incl progress report) | 26 April 2012 |
| EGTTS meeting(incl progress report) | 16 August 2012 |
| Submission of UK Timber Market Statement | mid September 2012 |
| EGTTS meeting (incl progress report) | 22 November 2012 |
| Final timber utilisation data | 31 March 2013 |

8. The successful candidate may be requested to participate in an initial meeting in April 2012 to discuss the contract in more detail.

Cost

9. It is envisaged that the **annual** costs (including travel) will be no more than around £10,000 (exclusive of VAT). Any travel expenses to attend meetings should be detailed in the proposal.

10. Payment will be made as work is completed and invoiced throughout the year.

Management of the project

11. For further information, please contact Sheila Ward at the following address; Forestry Commission, 231 Corstorphine Road, Edinburgh, EH12 7AT.Tel: 0131 314 6475 or e-mail sheila.ward@forestry.gsi.gov.uk. Please note that Sheila Ward is the project manager and that Lynne Rennie, whose contact details are on page 1 is the ITQ co-ordinator.

12. The successful consultant will report to the Expert Group on Timber & Trade Statistics.

References

- Statistics on the production, imports and exports of UK wood and wood products are published in Forestry Statistics 2011 (available from www.forestry.gov.uk/statistics).
- Further information on the Expert Group on Timber and Trade Statistics is available on the Forestry Commission website [here](#).
- Copies of previous UK Timber Market Statements are also available on the Forestry Commission website [here](#).

Note:

If we ask, you must provide documentary evidence establishing your eligibility to tender and your qualifications to fulfil the contract if we accept your quotation. This may be in the form of literature, drawings or samples.

You must include details of any areas where you will not be able to comply with these requirements. If your quotation does not meet these requirements we reserve the right to reject it completely.

Evaluation Matrix

| Section | Title | Weighting | Agreed Marking Criteria |
|---------|---|--|---|
| A | Form A – Organisation and Contact Details | Mandatory | Completion of this Section is mandatory and is for our information purposes. We may confirm company identity and basic details with external bodies. |
| A | Form B – Grounds for Mandatory Rejection | Pass/Fail | If you answer 'Yes' to any questions relating to mandatory rejection you will fail this section and your submission will not be evaluated any further. |
| A | Form C – Grounds for Discretionary Rejection | Pass/Fail | If you answer 'Yes' to any questions relating to discretionary rejection you may fail this section, however we will look for information from you that clearly indicates that you have resolved any past conduct or problem and taken steps to prevent it recurring. If we are satisfied that this is the case, you will pass this section. |
| B | Details Insurance Policies | Pass/Fail | You must have the required levels of insurance as requested in Section B. If you do not have these, you must confirm that you will get them if successful, before the contract start date. If you do cannot confirm this, you will fail this section. |
| C | Health and Safety Questions | Pass/Fail | You must provide the information we have requested in Section C. |
| D | <p><u>Specific Selection Questions</u></p> <p>Provide details of the background, experience and responsibility of team members in relation to the contract.</p> <p><u>Specific Award Questions</u></p> <p>Describe your proposed approach</p> | <p><u>Weight</u></p> <p>40%</p> <p>40%</p> | <p>The following evaluation system will be applied:</p> <p>0 – No response or totally inadequate response</p> <p>No response or an inadequate response</p> <p>1 – Major Reservations/Constraints</p> <p>The response simply states that the supplier can meet some of the requirements set out in the question or statement of requirements, but have not given information or detail on how they</p> |

| Section | Title | Weighting | Agreed Marking Criteria |
|---------|--|-----------|---|
| | and methodology including details of the annual work programme and identifying the timescale of the various steps involved | | <p>will do this.</p> <p>2 – Some Reservations/Constraints</p> <p>Bidder has provided some information about how they propose to meet most of the requirements as set out in the question or statement of requirements. There is some doubt in their ability to consistently meet the full range of requirements.</p> <p>3 – Fully Compliant</p> <p>Bidder has provided detailed information covering all elements of the question, detailing how they propose to meet all the requirements as set out in the question or statement of requirements. This gives full confidence in their ability to consistently meet the full range of our requirements.</p> <p>4 – Exceeds Requirements</p> <p>Bidder meets the required standard in all respects and exceeds some or all of the major requirements, which in turn leads to added value within the contract</p> |
| E | Pricing Schedule | 20 % | Weighted Average Price will be used as the basis to score the pricing |
| F | Declaration | Pass/Fail | You must provide a signed certificate with no exceptions on it. |
| G | Certificate of Bona Fide Tender | Pass/Fail | You must provide a signed certificate with no exceptions on it. |

Part A – Form A - Organisation and Contact Details

| Organisation Details | | |
|-----------------------------|---|--|
| | Question | Your Answer |
| A1 | Full name of organisation tendering (or of organisation acting as lead contact where a consortium bid is being submitted). | [] |
| A2 | Registered office address. | [] |
| A3 | Company or charity registration number. | [] |
| A4 | VAT Registration number. | [] |
| A5 | Name of immediate Parent Company. | [] |
| A6 | Name of ultimate Parent Company. | [] |
| A7 | Type of organisation. | i) a public limited company [] |
| | | ii) a limited company [] |
| | | iii) a limited liability partnership [] |
| | | iv) other partnership [] |
| | | v) sole trader [] |
| | | vi) other (please specify) [] |
| A8 | How many staff does your organisation (including consortia members and named sub-contractors where appropriate) employ relevant to the carrying out | [] |

| Organisation Details | | | |
|---|--|--|------------|
| | Question | Your Answer | |
| | of services and/or delivery of goods similar to those required under this contract? | | |
| A9 | Total number of employees employed by your organisation. (Including Directors, Partners, Apprentices, Trainees etc.) | [] | |
| A10 | Length of time your business has been operating. | [] | |
| A11 | Please state whether there is any potential conflict of interest in relation to this contract, for example if any of those involved with the contract share private interests with anyone within the FC. Examples include freemasonry, membership of societies, clubs and other organisations, and family. | No | Yes |
| | | [] | [] |
| | | If you have answered "YES" please give details. | |
| | | [] | |
| A12 | Consortia and Sub-contracting. | a) Your organisation is bidding to provide the requirement itself. | [] |
| | | b) Your organisation is bidding in the role of Prime Contractor and intends to use third parties to provide some services. | [] |
| | | c) The potential Provider is a consortium. | [] |
| If your answer is (b) or (c) please indicate in a separate annex (by inserting the relevant company or organisation name) the composition of the supply chain, indicating which member of the supply chain (which may include the Potential Provider solely or together with other providers) will be responsible for the elements of the requirement. | | | |

Contact Details – Contact details for enquiries relating to this process

| | | |
|-----|--|-----|
| A13 | Name. | [] |
| A14 | Address, including country and postcode. | [] |
| A15 | Phone. | [] |
| A16 | Mobile. | [] |
| A17 | Email. | [] |

These questions must be completed by Non-UK Businesses

| | | |
|-----|--|-----|
| A18 | <p>Registration with professional body.</p> <p>Is your business registered with the appropriate trade or professional register (s) in the EU member state where it is established (as set out in Annexes IX A-C of Directive 2004/18/EC) under the conditions laid down by that member state?</p> | [] |
| A19 | <p>Is it a legal requirement in the State where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement? If yes, please provide details of what is required and confirm that you have complied with this.</p> | [] |

Part A – Form B – Grounds for mandatory rejection

Important Notice:

In some circumstances we are required by law to exclude you from participating further in a procurement. If you answer 'Yes' to any question in this section it is very unlikely that we will accept your application, and you should contact us for advice before completing this form.

Please state 'Yes' or 'No' to each question.

| Has your organisation or any directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences? | Answer |
|---|---------------|
| (a) conspiracy within the meaning of section 1 of the Criminal Law Act 1977 where that conspiracy relates to participation in a criminal organisation as defined in Article 2(1) of Council Joint Action 98/733/JHA (as amended); | |
| (b) corruption within the meaning of section 1 of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906 (as amended); | |
| (c) bribery; | |
| (d) fraud, where the offence relates to fraud affecting the financial interests of the European Communities as defined by Article 1 of the Convention relating to the protection of the financial interests of the European Union, within the meaning of: | |
| (i) the offence of cheating the Revenue; | |
| (ii) the offence of conspiracy to defraud; | |
| (iii) fraud or theft within the meaning of the Theft Act 1968 and the Theft Act 1978; | |
| (iv) fraudulent trading within the meaning of section 458 of the Companies Act 1985 or section 993 of the | |

| | |
|---|--|
| Companies Act 2006; | |
| (v) defrauding the Customs within the meaning of the Customs and Excise Management Act 1979 and the Value Added Tax Act 1994; | |
| (vi) an offence in connection with taxation in the European Community within the meaning of section 71 of the Criminal Justice Act 1993; or | |
| (vii) destroying, defacing or concealing of documents or procuring the extension of a valuable security within the meaning of section 20 of the Theft Act 1968; | |
| (e) money laundering within the meaning of the Money Laundering Regulations 2003 or Money Laundering Regulations 2007; or | |
| (f) any other offence within the meaning of Article 45(1) of Directive 2004/18/EC as defined by the national law of any relevant State. | |

Part A – Form C – Grounds for discretionary rejection

Important Notice

We are entitled to exclude you from consideration if any of the following apply but may decide to allow you to proceed further.

If you answer 'Yes' to any question in this section it is very unlikely that we will accept your application, and you should contact us for advice before completing this form. In the event that any of the following do apply, please set out (in a separate Annex) full details of the relevant incident and any remedial action taken subsequently. The information provided will be taken into account by us when considering whether or not you will be able to proceed any further in respect of this procurement exercise.

Please state 'Yes' or 'No' to each question.

| Is any of the following true of your organisation? | |
|--|--------------------------|
| <p>(a) <u>being an individual,</u> is bankrupt or has had a receiving order or administration order or bankruptcy restrictions order made against him or has made any composition or arrangement with or for the benefit of his creditors, or has not made any conveyance or assignment for the benefit of his creditors or appears unable to pay or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of his estate, or is the subject of any similar procedure under the law of any other state;</p> | <input type="checkbox"/> |
| <p>(b) <u>being a partnership constituted under Scots law,</u> has granted a trust deed, or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of its estate; or</p> | <input type="checkbox"/> |
| <p>(c) <u>being a company or any other entity within the meaning of section 255 of the Enterprise Act 2002</u> has passed a resolution, or is the subject of an order by the court for the company's winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company's business or any part thereof or is the subject of similar procedures under the law of any other state?</p> | <input type="checkbox"/> |

| Has your organisation | |
|--|-----|
| (a) been convicted of a criminal offence relating to the conduct of your business or profession; | [] |
| (b) committed an act of grave misconduct in the course of your business or profession; | [] |
| (c) failed to fulfil obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or of the relevant State in which you are established; | [] |
| (d) failed to fulfil obligations relating to the payment of taxes under the law of any part of the United Kingdom or of the relevant State in which you are established; or | [] |
| e) been guilty of serious misrepresentation in providing any information required of you under Regulation 23 of the Public Contracts Regulations 2006? | [] |
| f) Has your organisation and/or any or your contractors had a gangmasters licence refused or revoked for any reason in the past. | [] |

Part B – Details of Insurance Policies

| Weighting: This is a Gateway Section (Pass/Fail) | | | | |
|---|----------------------------|------------|-----------|----------------------------------|
| You must either confirm that you have these levels of insurance in place for each and every claim rather than on an aggregate basis or, alternatively, undertake that should you be awarded a contract under this procurement such levels of insurance will be available to you and that you undertake to maintain these levels of insurance for the duration of the contract. | | | | |
| Insurance Policy | Indemnity Value (£) | Yes | No | Will secure if successful |
| Employers Liability (This is a legal requirement. There are a small number of exceptions. Please refer to HSE Guidance HSE 40 Employers Liability Compulsory Insurance Act 1969) | Min £5m per claim | | | |
| Public Liability | Min £2m per claim | | | |
| If you do not undertake to secure the stated levels of insurance, we will not consider your submission. | | | | |

Part C – Health and Safety Questions

This section allows us to assess your competency for health and safety. We have provided some guidance to help you understand the requirements for each area. You may also find it useful to refer to the Health and Safety Executive (HSE) website for some guidance before completing this section. You can find this here:

<http://www.hse.gov.uk/>.

General health and safety questions

| | Question | Yes | No |
|---|--|------------|-----------|
| 1 | Does your organisation have a written Health and Safety Policy? | | |
| | Note: if your organisation has less than 5 employees, the Forestry Commission still requires you to have a written Health and Safety Policy. | | |
| 2 | Please provide details of the health and safety training you provide to employees, relevant to this contract. If you do not provide any training, please tell us why this is not necessary. From your answer we will decide whether the training is appropriate or required for this contract. | | |

Part D – Specific Questions

| | Question | Weight % |
|-----------|---|----------|
| D1 | Provide details of the background, experience and responsibility of team members in relation to the contract. | 40% |
| | | |
| | Answer: | |
| | | |
| D2 | Describe your proposed approach and methodology including details of the annual work programme and identifying the timescale of the various steps involved. | 40% |
| | Answer: | |
| | | |

Part E – Pricing Schedule

Please provide details of your pricing in the schedule provided below.

| Ref | Description | Price (£) |
|-----|--|-----------|
| | Annual cost for provision of service comprising: <ul style="list-style-type: none"> • Monitor trends in timber utilisation; • Production of UK Timber Market Statement; • Prepare for and attend 3 meetings of Expert Group on Timber & Trade Statistics; • Five days of ad hoc support in addition to the above. This is the core service cost for each of the three years April 2012 – March 2013 April 2013 – March 2014 April 2014 – March 2015 | [[]] |
| | Additional cost per day of any additional support work called off by the Forestry Commission | [[]] |
| | Expenses | [[]] |
| | TOTAL core service cost per annum | [[]] |
| | TOTAL core service cost for three years April 2012 to March 2015 | [[]] |

Please note: any additional costs incurred, which are not reflected in the ITQ submission will not be accepted for payment.

Part F – Declaration

Weighting: This is a Gateway Section (Pass/Fail)

I declare that to the best of my knowledge the answers submitted in this ITQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to tender for your requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this ITQ if I have failed to answer all relevant questions fully, or if I provide false or misleading information.

Name: | |

Date: | |

Signature: | |

Capacity or Title: | |

For and on behalf of: | |

Part G – Certificate of Bona Fide Tender

Invitation to Quote No: CFSTEN1/12

Due for Return by: Friday 16 March 2012

Subject: Timber market and statistical support to the Expert Group on Timber Trade and Statistics

The essence of selective tendering is that the Forestry Commission will receive *bona fide* competitive tenders from all those tendering. In recognition of this principle, we certify that this is a *bona fide* tender, intended to be competitive, and that we have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person. We also certify that we have not done, and we undertake that we will not do so, at any time before the time specified for the return of this tender any of the following acts:

- communicate to a person other than the person calling for those tenders, the amount or approximate amount of the proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender was necessary to obtain premium insurance quotations required for preparing the tender;
- enter any agreement with any other person whereby they will refrain from tendering, or as to the amount of any tender to be submitted;
- offer or pay or give or agree to pay any sum of money or valuable consideration directly or indirectly to any person for doing, or having done, or causing, or having caused to be done, in relation to any other tender or proposed tender for this work, any act or thing of the sort described above.

In this certificate, the word 'person' includes any individual, partnership, association, or body either corporate or unincorporated; and 'any agreement or arrangement' includes any transaction, formal or informal, and whether legally binding or not.

Signature: | | Date: | |

Name: | | Position: | |

Signed for and on Behalf of: | |
