

# Below-threshold procurement Templates

## “Open” and “Closed” Tender Procedures

1.  
Background  
and context



## Below-Threshold Procurement

“Below-threshold” procurement refers to procurement of contracts with an estimated value below certain thresholds, established internationally and revised once every two years.

The current thresholds were set in January 2026 and are:

- For **Goods and Services**:
  - Where the contracting authority is a Central Government body: **£135,018**
  - For all other Contracting Authorities: **£207,720**
- For **Works** (including construction and demolition): **£5,193,000**
- For **Concession Contracts**: **£5,193,000**
- For contracts covered by the **Light Touch Regime**: **£663,540**

*When calculating whether a contract is above or below the relevant threshold, you should include any applicable taxes, including VAT.*

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Note that NHS Trusts are now treated as Central Government entities under PA 2023

Universities and Colleges, like Councils, are sub-central

*When calculating whether a contract is above or below the relevant threshold, you should include any applicable taxes, including VAT.*

## Below-Threshold Procurement – Reminder of Legal Position

The full legal regime for public procurement is intended to *primarily* apply to **above-threshold** procurement activity – because the public procurement regime partly exists to promote and facilitate cross-border trade.

Below-Threshold procurements are not subject to most of the rules in the Procurement Act 2023.

The limited rules which do apply can be broken down into categories:

- Advertising and Competition
- Award Notifications
- Shortlisting and Selection
- Procurement Principles

## Advertising and Competition

Below-threshold, there is no *automatic* requirement to carry out an **advertised** procurement process.

Below-threshold, there is no automatic requirement to carry out a **competitive** process.

It is left for individual authorities to decide what internal rules and procedures they wish to put in place. This will largely be addressed in Standing Orders or internal procurement rules:

- Some authorities require **three quotations** to demonstrate value for money.
- Some authorities impose a value threshold (perhaps £50,000, or £75,000) above which they require officers to run a **below-threshold Open Tender**.
- Some authorities leave it to officers to decide on a **case-by-case** basis whether to seek multiple quotations or simply award directly to a trusted local supplier or specialist provider.

The point is that it's up to the authority.

In some exceptional cases, there may be an obligation to carry out an advertised competitive procurement process – but this is not a default requirement. (We will examine this under “principles”).



# Advertising and Competition

- However:
- If the authority decides to carry out an advertised procurement process for a below-threshold contract...
- And if the estimated value of that contract is over:
  - £12,000 including VAT (for a Central Government authority), or
  - £30,000 including VAT (for anyone else)...
- ...then it must ensure that an advert is placed on the Central Digital Platform.



## Open ITT or Closed RFQ Procedures

- Two templates have been produced to assist you in running below-threshold procurements.
- These are:
  - An Open ITT template
  - A Request for Quotation process
- Both of these are designed as a single stage process. That is because, below the goods and services threshold, you are prohibited from using a multi-stage process. No form of shortlisting, in particular, is allowed.
- The difference is:
  - The Open ITT template is designed to be used for a fully advertised process, where you will place an advert on the CDP (as well as your own portal, if you have one);
  - The Request for Quotation (RFQ) is designed for procurements where you only invite a selection of chosen suppliers, without wider advertising at the point of invitation. This may be described as a Closed RFQ process since it is “closed” to only the participants that you select in advance.

## Closed RFQ Procedures

- In principle, there is no procurement law obstacle to having a Closed RFQ process for any below-threshold contract, or permitting direct award where this is permitted within the authority's own governance rules.
  - For example, whenever a requirement for a particular type of goods, works or services arises, simply selecting two or three local suppliers in the relevant market sector, and inviting them to quote.
  - However, this can create risks, in two scenarios in particular:
    - Where the "Anti-Avoidance" rule in Schedule 3, Paragraph 4 applies
- Or:
2. Where the process freezes out particular (local?) suppliers.



## 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

Schedule 3, Para 4 of the Procurement Act is a new version of the old “aggregation rules”.

It reads as follows:

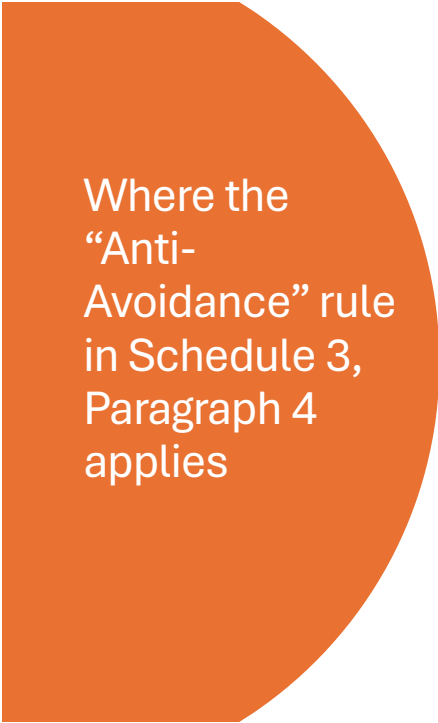
4 (1) Sub-paragraph (2) applies where—

- (a) a contracting authority estimates the value of two or more contracts, and
- (b) the goods, services or works to be supplied under the contracts could reasonably be supplied under a single contract.


(2) The contracting authority must estimate the value of each of the contracts as including the value of all of the contracts, unless the authority has good reasons not to do so.

What this means is simple: If, when you invite quotations for a below-threshold contract, you knew, or should reasonably have known, that there was more work to come, which would then be later procured via more below-threshold contracts....

...then you ought to **aggregate** the exercise into a single, higher-value procurement unless there is a “good reason” not to combine the contracts into a single requirement.



Where the  
“Anti-  
Avoidance” rule  
in Schedule 3,  
Paragraph 4  
applies


- What is a “good reason” for not aggregating?
  - The PA 2023 Guidance offers some general examples:
    - Where a business unit within a large contracting authority has a delegated budget and procures only for the purposes of that business unit;
    - Where there are many business units with their own needs that cannot feasibly be expected to know every procurement requirement of other business units within the wider organisation;
  - Where not aggregating would lead to better value outcomes.
- 

## 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

What is a “good reason” for not aggregating?

The **PA 2023 Guidance** offers some general examples:

- Where a business unit within a large contracting authority has a delegated budget and procures only for the purposes of that business unit;
- Where there are many business units with their own needs that cannot feasibly be expected to know every procurement requirement of other business units within the wider organisation;
- Where not aggregating would lead to better value outcomes.




For example, where an authority has a highly autonomous unit like a printing works, shared services hub, etc., which functions almost like a separate entity and has its own budget control.

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- Where not aggregating would lead to better value outcomes.



For example, procurement by local authority maintained schools with a high degree of autonomy over buying decisions.

## 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

What is a “**good reason**” for not aggregating?

Take careful note: “*To avoid the extra work involved in running an above-threshold project*” is unlikely to be a “good reason”!

## 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

### Practical examples:

In **January 2026** an Authority ran a limited quotation exercise for the design and hosting of a **bespoke public-facing website** to promote a particular project.

The estimated value is £65,000 (total) over two years.

Three local web design agencies are invited to quote. **Funky Web Ltd.** wins with a price of £64,000.

In **August 2027** the same Authority runs a limited quotation exercise for technical ICT consultancy advice to support the upgrade of its internal **Intranet**, plus ongoing development support for up to three years.

The estimated value is £150,000 (total).

The Authority learns that **Funky Web Ltd.** also provides this type of support. They are invited to quote alongside one other supplier. They win with a price of £142,000.

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The Authority learns that **Funky Web Ltd.** also provides this type of support. They are invited to quote alongside one other supplier. They win with a price of £142,000.

In this example there is no risk of breaching the anti-avoidance rules in PA 2023 because these can safely be defined as separate projects, which are not part of a single requirement.

## 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

### Practical examples:

In **January 2026** an Authority ran a limited quotation exercise for the provision of **tree surgery services** at its “King’s Meadow” site.

The estimated value is £65,000 (total).

Three local horticultural suppliers are invited to quote. **Justin Credible Trees and Gardens** wins with a price of £64,000.

In **August 2026** the same Authority runs a limited quotation exercise for **tree surgery services** in four other open parkland spaces it is responsible for.

The estimated value is £150,000 (total).

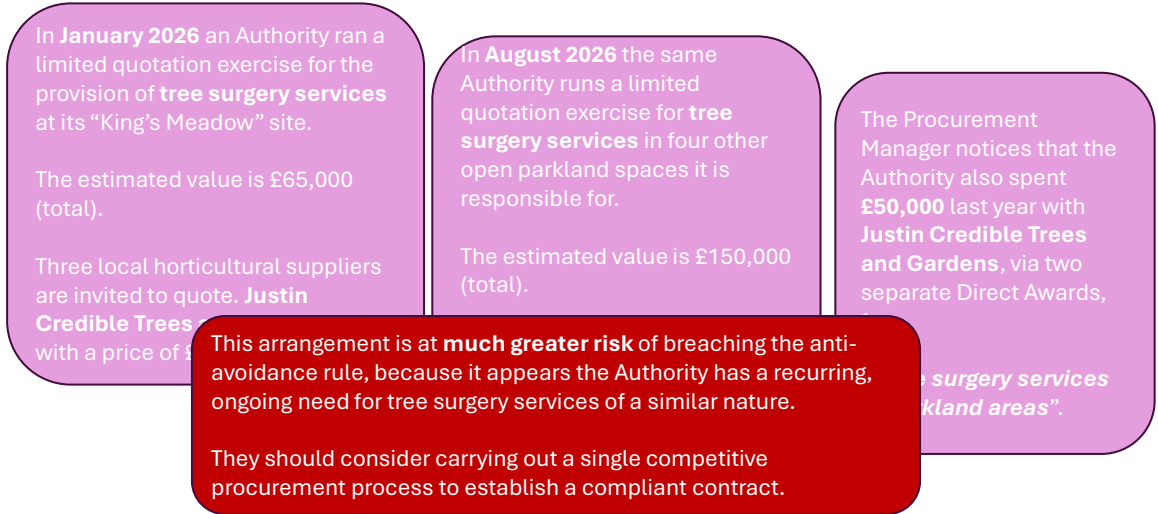
The same three local horticultural suppliers are invited to quote.

The Procurement Manager notices that the Authority also spent **£50,000** last year with **Justin Credible Trees and Gardens**, via two separate Direct Awards, for...

*“Tree surgery services in parkland areas”.*

### 1. Where the “Anti-Avoidance” rule in Schedule 3, Paragraph 4 applies

**Practical examples:**



## 2. Where the process freezes out particular suppliers

Even where there is not a significant risk of breaching the “anti-avoidance” rule in the Procurement Act, there is a potential risk of **reputational damage** or even **complaints to the Procurement Review Unit** if excessive use is made of a limited roster of companies, which other firms are arbitrarily excluded from.

Obtaining **three quotes** from the **same three local suppliers** each time may appear to demonstrate a basic approach to value for money, while also keeping the trade local.

But what if there is a **fourth** capable local supplier, or even a wide range of good-quality local firms? Why are only the select three being offered all the work?

Consider the **risk of complaint** from those arbitrarily locked out of the process. Your business can have a significant impact on the **local market** – don’t you want to treat the local market fairly?

Is it possible for you to design a procedure that ensures that, over time, **a variety of capable firms** are given opportunities to quote?

For very common recurring requirements, could you even set up a Framework?



## 2. The **Closed RFQ** and **Open ITT** templates

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## Common Features

Both templates have a common drafting approach, and some parts are **colour-coded** to aid you.

Where you see text in:

- **Blue highlight** - means the text is for your guidance only, you must delete it before issuing to suppliers.
- **Yellow highlight** - means you must complete the section, by adding relevant information, before issuing to suppliers.
- **Green highlight** - means that section is optional, you can keep it, or delete it, to suit your particular needs.

**Important notes on using this document:**

This document is designed for use in sub-threshold procurements below the applicable Find a Tender Service threshold. When valuing contracts to ensure the estimated value is below the relevant threshold, please make sure you include all payments to be received by the Supplier, (including options or extensions). [NOTE TO AUTHORITY: your own "relevant threshold" may depend on your Standing Orders and you may wish to reference it here]

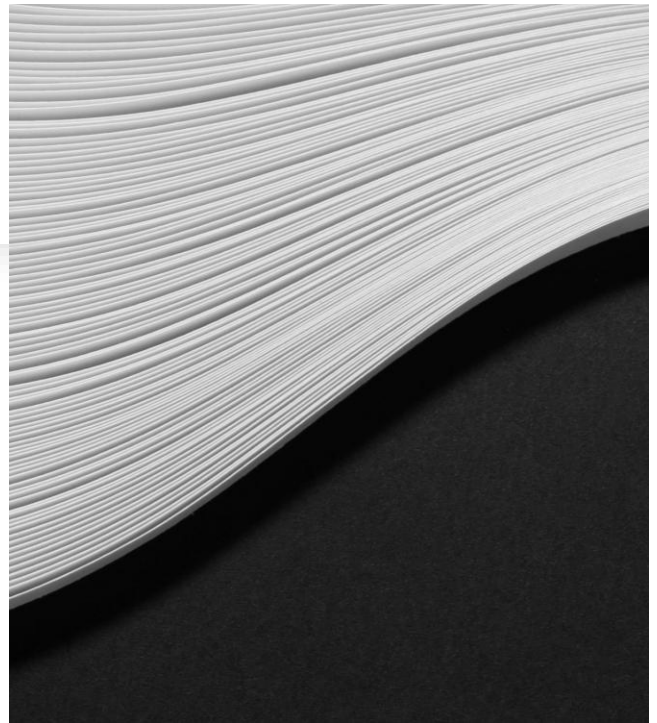
When you have finished populating the template and you have removed all guidance notes and unused / non-applicable content / clauses, ensure that you check and correct as required all cross-references – paragraphs, schedules, page numbers, headings and formatting.

Black text on a white background	Indicates matters which are seen as the minimum text that the RFQ includes - should normally be left as is and not removed.
Black text highlighted in yellow	Indicates text you need to complete with the relevant information e.g., a timescale, party information, a relevant date etc.
Black text highlighted in green	Indicates text which provides optional content which you may want to include or delete depending on what your contract is for.
Black text highlighted in blue	Indicates text which are guidance notes, please review and consider how they affect what you are doing. Then delete them all before issue.

**DELETE THIS ENTIRE PAGE BEFORE PUBLISHING / ISSUING TO SUPPLIERS**

## Important note

- Template documentation should be appropriately reviewed to ensure it is fit for purpose, clear, and appropriately customised to the specific objectives and requirements of each contract in future procurement exercises.



## Common Features

For example, here is the front page of the **RFQ** template.

Tender Reference <b>xx</b> RFQ Document	
<b>Request for Quotation</b> For the provision of <b>&lt;REQUIREMENT&gt;</b>	
Deadline for RFQ Submission:	<b>&lt;TIME&gt;</b> on <b>&lt;DATE&gt;</b>

## Common Features

For example, here is the front page of the **RFQ** template.

You need to populate:

Your internal reference number

Tender Reference **xx**  
RFQ Document

The title of the requirement.

**Request for Quotation**

For the provision of **<REQUIREMENT>**

The deadline date and time.

Deadline for RFQ Submission: **<TIME>** on **<DATE>**

## Common Features

Both templates treat the requirement for Suppliers to register on the **Central Digital Platform** (Find A Tender Service) as a mandatory requirement.

This is because for any contract award over £12,000 (Central Government), or £30,000 (sub-central), you will not be able to publish the required notices if the supplier is not registered on the Platform.

Even if the procurement is not advertised in advance, it is now sensible practice to insist that suppliers are registered.

### 5. Government Central Digital Platform (CDP)

- 5.1 Suppliers participating in public procurement are now required, under the Procurement Act 2023 ("the Act"), to be registered on the Government's Central Digital Platform (CDP). **If you are not registered on the CDP you will not be able to participate in this procurement opportunity.** The CDP is available at <https://www.gov.uk/find-tender>.
- 5.2 If you have entered up to date Core Supplier Information in the CDP, you will be able to use it to easily answer some of the questions in this RFQ as indicated in Part 3.
- 5.3 The Act provides for an 'exclusion regime' and a published 'Debarment List' to safeguard public procurement from Suppliers who may pose a risk (for example, due to misconduct, criminal activity, or poor performance). If you have submitted up to date Core Supplier information to the CDP, you will be able to use that information in responding to this RFQ,

## The RFQ template

For the RFQ, other sections you'll need to complete are clearly indicated.

They include:

- The **table of contents**;
- **Introductory details** and the **background to the requirement**;
- Contract **term** (i.e. duration, and extensions);
- The outline **timetable**;
- The **Specification** of requirements;
- The **Conditions of Participation**;
- The **Award Criteria**, their weightings, and associated **Questions**;
- Your **Contract Terms and Conditions**.

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- The **Award Criteria**, their weightings, and associated **Questions**;
- Your **Contract Terms and Conditions**.

We will use the RFQ template as an example of how to populate the document.

There is not time today to go through every single page, but let's focus on some really key items.

## The RFQ template

Remember that yellow sections need to be completed, while green sections are optional.

### Part 1: Background, Outline of Process & Timescale

1. Introduction to the Contracting Authority ("Authority")
  - 1.1. <Insert brief introduction to the Contracting Authority>
2. Background to the requirement
  - 2.1. The purpose of this Request for Quotation (RFQ) is <brief details> ("Contract").
  - 2.2. The Contract will be managed by <which team, department, etc>.
  - 2.3. <Insert additional background information, location, as appropriate>
3. Contract Term
  - 3.1. The term of the proposed Contract shall be <indicate initial contract period> <followed by xx discretionary extension periods, at the sole discretion of the Authority, each of xx duration>.
4. Timetable
  - 4.1. The following is an indicative timetable for the RFQ. The Authority reserves the right to amend this timetable where necessary during the RFQ process.

Issue RFQ document	[INSERT]
<Deadline for request for site visits>	[INSERT]
<Deadline for site visits to take place>	[INSERT]
<Deadline for Suppliers' clarification questions>	[INSERT]
Deadline for RFQ Responses	[INSERT]
Notification of RFQ Award Decision	[INSERT]
Anticipated Contract Start Date	[INSERT]

## The RFQ template

Remember that yellow sections need to be completed, while green sections are optional.

You should have some brief standard text introducing your organisation

Then a brief summary of the requirement (not a full specification, that comes later)

The initial contract period must be stated. Whether you allow for extensions is up to you, but should be determined in advance, and made clear.

An indicative timetable is provided, which you should complete as an aid to suppliers.

If site visits are used, the timing of them should be made clear.

### Part 1: Background, Outline of Process & Timescale

1. Introduction to the Contracting Authority ("Authority")
  - 1.1. <insert brief introduction to the Contracting Authority>
2. Background to the requirement
  - 2.1. The purpose of this Request for Quotation (RFQ) is <brief details> ("Contract").
  - 2.2. The Contract will be managed by <which team, department, etc>
  - 2.3. <insert additional background information, location, as appropriate>
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Deadline for RFQ Responses	[INSERT]
Notification of RFQ Award Decision	[INSERT]
Anticipated Contract Start Date	[INSERT]

## The RFQ template

Every RFQ will need a Specification or Statement of Requirements.

This is the key section which explains what you want to buy.

If the requirement is quite technical, and contains drawings or diagrams, you may wish to provide it as a separate document.

But, if so, very clearly indicate this, so that suppliers know to look for it.

### Part 2: Specification of Requirements

- 2.1 The purpose of this RFQ is to appoint a Supplier to carry out <headline description of goods, services, or works>
- 2.2 The specific requirements shall include:
  - 2.2.1 <SPECIFY>

## The RFQ template

The **Preliminary Questions** and **Grounds for Exclusion** are based on standard Government practice.

You should not need to alter Part 3 - 1 or Part 2, they should be the same in every RFQ you issue.

### Part 3: Preliminary Questions

#### 1. Potential Supplier Information

- 1.1. Please answer the following questions in full. Note that every organisation that is being relied on to meet the Conditions of Participation must complete and submit Part 3.1 and 3.2, and the declaration in Part 5.2.

No.	Question
<b>Preliminary questions</b>	
1.	What is your name? (supplier name) ----- [Insert name]
2.	You must be registered on the central digital platform (CDP). What is your central digital platform unique identifier? ----- [Insert unique identifier]
3.	Please confirm if you are bidding as a single supplier (with or without sub-contractors) or as part of a group or consortium. If you are bidding as part of a group or consortium (including where you intend to establish a legal entity to deliver the contract), please provide: a. the name of the group/consortium b. the proposed structure of the group/consortium, including the legal structure where applicable c. the name of the lead member in the group/consortium d. your role in the group/consortium (e.g. lead member, consortium member, sub-contractor) ----- [Insert information]
4.	<b>[Where applicable] Please confirm which lot(s) you wish to bid for?</b> ----- [Insert details]
5.	Are you on the debarment list? ----- [Insert Yes or No] [If yes, insert details]

#### Preliminary questions

1. What is your name? (supplier name)

-----  
[Insert name]

2. You must be registered on the central digital platform (CDP).  
What is your central digital platform unique identifier?

-----  
[Insert unique identifier]

3. Please confirm if you are bidding as a single supplier (with or without sub-contractors) or as part of a group or consortium.  
If you are bidding as part of a group or consortium (including where you intend to establish a legal entity to deliver the contract), please provide:

- the name of the group/consortium
- the proposed structure of the group/consortium, including the legal structure where applicable
- the name of the lead member in the group/consortium
- your role in the group/consortium (e.g. lead member, consortium member, sub-contractor)

-----  
[Insert information]

4. **[Where applicable] Please confirm which lot(s) you wish to bid for?**

-----  
[Insert details]

5. Are you on the debarment list?

-----  
[Insert Yes or No]

[If yes, insert details]

## The RFQ template

Where you are using Pass / Fail **Conditions of Participation** you should populate this summary table to clearly list them.

The RFQ template provides a few sample Conditions of Participation covering **Insurance, Health & Safety** and **Data Protection**.

These are **optional** and you should determine what you need based on the nature of the procurement.

You can also add your own, but *be proportionate*. An RFQ with 20 bespoke Conditions of Participation would be very unwieldy and some suppliers may refuse to participate. It will also increase your workload.

Be sensible!

### 3. Conditions of Participation

3.1. RFQ Responses that pass parts 2 and 3 shall be evaluated based on the following Conditions of Participation, which are assessed on a Pass/Fail basis:

Conditions of Participation	
C.1 - <List Conditions of Participation>	PASS/FAIL
C.2 - <List Conditions of Participation>	PASS/FAIL
C.3 - <List Conditions of Participation>	PASS/FAIL

Please answer all questions in this Part.

[Note Authority: All the template Conditions of Participation provided in this Part are **optional** and you should select those relevant to the Contract, and where relevant and proportionate, add your own]

## The RFQ template

The **Award Criteria** also need to be populated.

Even more so than for Conditions of Participation, they need to be relevant to the procurement each time.

You should provide a summary, and the relative weightings, in this table:

### Part 4: Award Criteria

#### 1. General Principles of Award Criteria

- 1.1. RFQ Responses passing Part 2 and Part 3, and which meet the Conditions of Participation (3), shall be evaluated based on the following Award Criteria:

<b>Quality – XX% overall weighting</b>	
Q.1 - <List scored award criteria with weightings>	XX%
Q.2 - <List scored award criteria with weightings>	XX%
Q.3 - <List scored award criteria with weightings>	XX%
<b>Price – XX% overall weighting</b>	
P.X – Total Price	XX%
<b>Total Score (Most Advantageous Quote)</b>	<b>XX%</b>

- 1.2. The Supplier who has the highest Total Score based on the principle of Most Advantageous Quote shall be awarded the Contract.
- 1.3. If there is more than one quote with the same Total Score, then the deciding criteria between those quotes shall be the lowest price.

## The RFQ template

The **Award Criteria** also need to be populated.

Then for each **question**, you need to populate the template.

Also set a clear Word Count or Page Limit, to prevent Suppliers submitting “War and Peace”:

### 2. Award Criteria – Quality (Overall **XX%** Weighting)

- 2.1. You should use this section to provide your responses to the qualitative award criteria.
- 2.2. Suppliers are required to respond to all stated Award Criteria below. All Award Criteria questions should be answered in full and not refer to other documents or appendices, unless otherwise indicated. Any such documents or appendices must be referenced within the response box to that question and given a clear file name for ease of reference.
- 2.3. For each Award Criteria question, there is maximum word or page limit. RFQ Response's exceeding the stated limit shall be scored to the maximum word/page limit only. Please adjust as necessary the size of the 'response' box to accommodate your response.

Q.1	<b>xxxxx (Weighting xx%)</b>
Set out the question here	
Your response: (Maximum <b>1,000 words/Page Limit of [xx pages]</b> )	

## The RFQ template

At the end of the document there is a space for you to attach your **terms and conditions**:

These may be short enough to paste in, or you may wish to provide them as a separate document, but in the latter case, be clear about where to find them.

### Schedule 1 – Authority Contract Terms and Conditions.

The contract attached is the Authority's standard blank contract template and the final version will be populated with full details including the details of the successful Supplier (name, address etc) plus the further information from the RFQ Response (specification, pricing schedule, responses to Award Criteria etc). The final populated version of the contract will be issued for e-signing.

The Authority will not enter into any post-award negotiations in relation to amending the contract clauses.

**[Attach standard contract terms]**

## The Open ITT

The **Open ITT** is similar in concept to the **RFQ** but consists of up to four documents:

**Part 1:** Instructions for Suppliers (including Specification);

**Part 2:** Terms and Conditions;

**Part 3:** Tender Submission document;

**Part 4:** Pricing Schedule.

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**Part 2:** Terms and Conditions;

**Part 3:** Tender Submission (quality) document;

**Part 4:** Pricing Schedule.

- **Part 2 is the same as “Schedule 1” at the end of the RFQ template**
- **Tender submission is separated into:**
  - **Part 3 (Quality Submission)**
  - **Part 4 (Price)**
- **The Part 1 Instructions are more detailed than in the RFQ, so let’s look at some key points.**

**Overview**

Item	Reference
Contract Title:	[INSERT]
Associated Tender Documents Issue Date:	[INSERT]
Contracting Authority Public Procurement Organisation Number (PPON)	[INSERT]
Contracting Authority Name and Address:	[INSERT]
Contracting Authority contact details:	Messaging Facility via the Authority's e-tender system ("Procurement Portal") [Insert Link]
Estimated Value of Contract (including applicable VAT)	[INSERT]
Contract Period:	[INSERT, include option(s) to extend (delete if not required)]
Tender Submission Deadline:	[INSERT] Submissions including the upload of all documentation must be before the Tender Submission Deadline. It is the Supplier's responsibility to ensure that you are able to access and upload information in advance of this Tender Submission Deadline. Any tender submission received after the Tender Submission Deadline will NOT be accepted.
Anticipated Contract Commencement Date:	[INSERT]

## The Open ITT

The **Open ITT** includes a **Glossary** of key terms, a few of which need to be populated:

### Glossary of Key Terms

Common terms and expressions used in the Associated Tender Documents shall have the meanings ascribed to them in the Glossary.

All references to a 'section' are to a section in the Act unless otherwise stated.

All references to a 'Paragraph', 'Appendix' or 'Annex' are to a paragraph, appendix or annex of the relevant Associated Tender Document, unless otherwise stated.

<b>Abnormally Low Tender</b>	Means a situation where the Contract Price offered by the Supplier raises doubts as to whether the Tender Submission is economically sustainable and will properly deliver the Tender Specification under the Contract.
<b>Act</b>	Means the Procurement Act 2023, and any implementing Regulations (The Procurement Regulations 2024).
<b>Associated Person</b>	Means a person the Supplier is relying on in order to satisfy the Specification or the Suitability Conditions (other than a guarantor), as defined in section 26(4) of the Procurement Act 2023.
<b>Associated Tender Documents</b>	Means, in relation to a Below Threshold Tender Notice, the documents setting out details of the <b>Goods, Services or Works</b> required by the Authority.
<b>Contract Award Letter</b>	Means a letter sent by the Authority to the Successful Supplier following completion of the evaluation and moderation process, confirming the intention to award it a Contract.
<b>Contracting Authority or Authority</b>	<b>[Insert]</b>

## The Open ITT

As for the RFQ, remember that **yellow** sections need to be completed, while **green** sections give you options. **Blue text** is for your own guidance and should be deleted when the document is ready:

Use the following section to introduce the Contracting Authority and provide a high-level overview and objective of the Procurement/ Contract.

### 1. Introduction to the Authority and Procurement Process

- 1.1. **[insert Name of Member organisation]** (the "Authority") is a public Contracting Authority, **[insert further details as appropriate]**. Further information about the Authority can be found on our website here – **[insert website link]**.
- 1.2. This opportunity ("Contract") relates to the provision/delivery of **[write single sentence to describe the Goods/ Services/Works]**. The estimated value of the Contract is **€[insert]** per annum (including VAT), based on the contract history and on the potential **[insert term]** of the Contract **and any options to extend**. The total value of the proposed Contract is given as **€[insert]**.
- 1.3. The Contract shall be procured in a single stage ("Procurement Process") as a 'regulated below-threshold contract' in accordance with Part 6 of the Procurement Act 2023 (the "Act"). The Authority is seeking a Supplier to deliver the Contract described in the Tender Specification (which forms part of the Associated Tender Documents).
- 1.4. **Terms and conditions of participation** - Suppliers agree that participation in the Procurement Process is subject to the terms and conditions set out in this Invitation to Tender ("ITT"). Suppliers are required to respond with their Tender Submission before the stated Tender Deadline in Paragraph 9.1 below - Procurement Timetable.
- 1.5. **Associated Tender Documents** - Table 1 below contains list of the Associated Tender Documents used in the Procurement Process; explaining why the Authority has included these and what action is required to be taken by Suppliers:

## The Open ITT

As you prepare your ITT Instructions, read through the blue text carefully; it contains a lot of helpful information about how you should populate the document:

### 3. Tender Specification

- 3.1. The Authority requires **Insert full details of the specification as appropriate. Please note that in most cases, the tender specification can be detailed in this ITT document. Where there are complex or more detailed specification requirements, it may be efficient to include it as a separate Part of the Associated Tender Documents. If this is the case, please update Table 1 above and refer that the Tender Specification is available in Part [X] in this Paragraph only.**

#### 3.2 Site Information

- 3.3 Potential Suppliers are strongly advised to make necessary site visit(s) (where this has been made available by the Authority) prior to completing their Tender Submission, to ensure that they are familiar with site locations, relevant local conditions, and ensure all necessary due diligence is undertaken, as would reasonably be expected in making a Tender Submission of this nature, value and scale. The information in this Paragraph 3 (and any attached Parts/ Annexes) is given as an indication of the general requirements of the Contract.

#### 3.4 Site/ Delivery Address [insert further details]

#### 3.5 Site access, restrictions and arrangements [Insert details of site visit times etc]

#### 3.6 Site Visit Scheduling: during the Procurement Process, all site visits will need to be requested through the messaging facility on the Procurement Portal

## 8. Insurance Requirements

- 8.1. The Authority requires the Successful Supplier to hold the following types and minimum levels of insurance listed in Table 2 for the Contract Term.

**Table 2**

Type of Insurance:	Minimum level required
Public Liability	£5 million
Employers Liability	£5 million
Professional Indemnity	£1 million
Cyber Liability	£1 million
Other Insurance	Insert amount

**TAKE CARE** to ensure the table above matches the insurance thresholds specified in the Tender Submission document – **Part 3**.

ble 3

Procurement Activity	Indicative Date/ Time
Below-Threshold Tender Notice and Associated Tender Documents published on the Central Digital Platform and Procurement Portal.	[INSERT DATE]
Site Visit	[INSERT Date], if not required, delete
Tender Clarification Deadline (receipt of questions from Suppliers).	[INSERT DATE/ TIME]
Target date for Authority responses to Tender Clarifications.	(Please allow minimum of 6 days for responses to be issued before the T Deadline)
Tender Submission Deadline.	[INSERT DATE/ TIME] (allow reason days, based on value and complexity

	starting from the date of publication of the Below Threshold Tender Notice).
Completion of Tender Evaluation	[INSERT DATE] (allow time for evaluators to review Tenders, ensure evaluators are not on annual leave during this stage, the procurement team must also be available to moderate, so allow plenty of time).
Internal governance and sign off/ Acceptance Process / Contract Award Letter/ Unsuccessful Supplier letters	[INSERT DATE] (allow up to 5 Working Days between 'completion of evaluation' and 'notification of intention to award' to ensure sufficient time for final clarifications and to prepare Contract Award Letter. The budget holder must also approve the award decision. Consider whether or not Senior Management Team approval is also required).
Signature of Contract by the Parties and Publication of Contract Details Notice	[INSERT DATE]
Anticipated Commencement "Go Live" Date	[INSERT DATE] (allow reasonable time between award and commencement to help with supplier onboarding).
Initial Contract Term	[INSERT PERIOD] (Number of months/years of initial contract term – see Paragraph 4.1 above)
Optional Renewal Period	[INSERT PERIOD] Number of months/years for any available extensions – See Paragraph 4.2 above

**10. Instructions on Completing the Tender Submission**

- 10.1. Suppliers shall make the Tender Submission strictly in accordance with, and subject to the terms and conditions of this ITT.
- 10.2. Suppliers should read and follow the ITT instructions carefully before completing their Tender Submission. In submitting the Tender Submission, Suppliers confirm that they have read and understood the contents and instructions detailed in the ITT. Please note that failure to comply with or follow the instructions in the ITT may result in a Supplier's Tender Submission being disqualified, at the Authority's discretion.
- 10.3. Suppliers must not make any changes, lock or restructure the order of the Associated Tender Documents provided (except as necessary to accommodate their submission i.e. enlarging response boxes etc.). Suppliers should answer all the questions as accurately as possible using the format and page limit provided. Use of diagrams and charts is permitted, but inclusion will count as part of the relevant page limit.

- 10.4. Suppliers must also complete and return the Schedule of Exempt Information Statement - Freedom of Information Act & Environmental Information Regulations (**Appendix 1**), Conflicts of Interest (**Appendix 2**) and Form of Tender and Declaration (**Appendix 3**) with the Tender Submission document - Part 3. The contents of the Tender Submission will be included in the final Contract with the Successful Supplier. Suppliers should therefore ensure that their Tender Submission is authorised at an appropriate level in their organisation, as this will form part of a binding Contract with the Authority (if they are successful).
- 10.5. Suppliers must submit one copy of their Tender Submission electronically through the Procurement Portal, with any additional documents required or requested. Documents must be compatible with Microsoft Office or Adobe/PDF, and written in English, using a sans serif Font 11, and standard margins.
- 10.6. Suppliers must ensure that they comply with any stated word/page limit indicated in the Tender Submission template. Additional information in excess of any such word/page limit will be disregarded by the Authority.
- 10.7. Where a question does not apply, please state "Not Applicable". If the Supplier does not know the answer, please write "Not Known" - and in this case, the Supplier may also wish to add appropriate comments to explain why it is unable to provide a full answer. Suppliers must however satisfy themselves that they can (either individually or through the use of Sub-contractors) deliver the Authority's Tender Specification in full and to the required standards.
- 10.8. Suppliers should only submit additional information or documents if directed to do so by the Authority in the Associated Tender Documents, with a clear reference on each additional information item to the question to which it relates. Any unreferenced additional information will be disregarded by the Authority. Also, Tender responses to each Quality Award Criteria are self-contained, and Suppliers should not cross-refer to responses in other Quality Award Criteria, as this will not be picked up by evaluators (who may not necessarily evaluate all of the Quality Award Criteria).

- 10.9 It is important that the Tender Submission provides specific evidence or examples that demonstrates the Supplier's ability to meet the Tender Specification. Suppliers must not submit general organisational literature, marketing or promotional brochures (if not requested), as these will not be considered to be an appropriate response to the Quality Award Criteria, nor will they be considered in the evaluation process.
- 10.10 Please note that additional documentation, links or references to websites must not be submitted unless specifically requested by the Authority. Such unrequested documents and links will be disregarded. Where any specific documentation is required, it will be clearly stated within the Associated Tender Documents and must be clearly referenced in the Tender Submission. Failure to reference additional documentation clearly will result in the information being disregarded.
- 10.11 Where any Quality Award Criteria refers to relevant UK legislation (e.g., requirement for BSI accreditation) non-UK based Suppliers should answer on the basis of applicable laws or accreditations in their own country.
- 10.12 Only one Tender Submission is permitted from each Supplier. If a Supplier makes more than one Tender Submission, the Authority shall evaluate the one with the latest time of submission and the other(s) shall be disregarded.
- 10.13 AI tools can be used to improve the efficiency of a Supplier's Tender Submission; however, they may also introduce an increased risk of misleading statements via 'hallucination'. Tender Submissions should therefore clearly identify any instances where AI or machine learning tools, including large language models have been used to generate written content, or support the Tender Submission.
- 10.14 The Authority recognises that Suppliers may seek to utilise the services of bid writers and/or Artificial Intelligence ("AI"). The Authority expects Suppliers to ensure that their Tender Submission is checked for validity and appropriateness to meet the Tender Specification. The Supplier should also note that (if successful) their Tender Submission shall form part of the Contract between the Parties and will be expected to deliver on the agreed terms.
- 10.15 If a Supplier is utilising the services of a bid writer, they should seek to ensure that the organisation or individual is solely working for them on this Procurement Process and not also acting on behalf of another potential Supplier, which could result in a Conflict of interest. If the Authority receives two (2) or more Tender Submissions that appear to be identical, it reserves the right to notify the Competition & Markets Authority of potential collusive tendering.

Scoring Matrix

Note: The scoring matrix is an example that could be used, tailored to your project, or substitute your own suitable marking scheme.

Scoring range = 0-5	Categorisation	Evaluation description
0	Cannot be scored	No response has been provided or the response provided does not adequately address the relevant question to allow for a proper assessment to be made.
1	Poor	The response provides inadequate detail and does not demonstrate that the supplier meets the requirements in most of the areas with omissions in relation to the proposed solution to deliver the service. As a result, the scorer lacks confidence that the supplier understands the requirements and is capable of delivering them.
2	Below expectations	The response contains some omissions and / or is not well supported by evidence / examples. As a result, the scorer has some concerns about the supplier's ability to deliver / that they have failed to meet a reasonable standard.
3	Adequate	The response demonstrates an understanding of the requirement but lacks evidence, detail and/or assurance to support how the requirements will be met. As a result, the scorer has some confidence that the supplier understands the requirements but has some reservations of their capability of delivering them due to lack of evidence support this.
4	Good	The response demonstrates with a good level of detail, evidence and/or assurance how most of the requirements will be met in all key areas but may have a small number of minor reservations. As a result, the scorer is confident that the supplier understands the requirements, is capable of delivering them to a good standard.
5	Excellent	The response is comprehensive and well evidenced demonstrating expertise and knowledge incorporating value & other points of innovation aligned to the organisations' tender requirements. The response fully captures the understanding of the steps involved to deliver the aspects of the question posed. As a result, the scorer has a very high level of confidence of the Participant's experience and ability to deliver to a high standard.

This template assumes that the Authority practises silo scoring by evaluators and then has a moderation process. If not, please amend accordingly.



# Q&A and Discussion

**What Network PA2023.org membership gives you:**

**Advice**

Phone, email or Teams Appointment to access expert helpdesk for technical support. Answering your questions on procurement and contract management as they arise. An expert on the line to talk things through with and gain assurance.

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Timely technical procurement updates on latest developments and new regulations.  
Full access to Network PA2023.org website resources.

**Contact:**

[mohamed.hans@in2thebargain.com](mailto:mohamed.hans@in2thebargain.com)

07717 345188

for details of benefits and pricing

# Questions

[mhans@procuretoday.co.uk](mailto:mhans@procuretoday.co.uk)  
Mobile: 07717345188

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