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Bid Assessment Criteria

**Document Governance Page**

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| **Title: Portsmouth Water Limited:**  **PR19 Water Resources Plan Bid Assessment Criteria** | | | | **Ref:**  **Bid Assessment Criteria** | | |
| Issue | Purpose | Originator | Checked | Reviewed | Authorised | Date |
| 1 | Draft Business Plan | ICD | MM | SM | RP | August 2018 |
| 2 | IAP Response | AG | ID | SM | HMGO | July 2019 |
| 3 | Ofwat feedback (e-mail 23 Sept 2019) | MS | SM | SM | HMGO | December 2019 |
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# Introduction

This is the Portsmouth Water Bid Assessment Framework (BAF), it supports the bidding market for demand management, leakage services and water resources by giving third parties confidence that their proposals for addressing water resource issues will be assessed fairly.

This document sets out the high level scope of works required to meet the requirements of the draft and final WRMP and invites third party bids to provide solutions which will influence the way in which the final WRMP is implemented. This document also sets out how the bid process operates to ensure that assessment of third party bids adheres to the Company’s procurement strategy and Ofwat’s guidance (Appendix 8: Company bid assessment frameworks) to ensure that the key procurement principles of transparency, equal treatment, non-discrimination and proportionality are met. The overall aim of the process is to identify more efficient providers of services, resulting in reduced costs and better value to customers.

The bid assessment criteria complies with the requirements of the Trading and Procurement Code (TPC) and assures compliance with the Utilities Contracts Regulations 2016 (UCR16) and general competition law.

This BAF should be read in conjunction with our:

* *Trading and Procurement Code*, which sets out the policies, principles and requirements that will apply should we enter into a water trade has already published a Trading and Procurement Code. It sets out the policies, principles and requirements that will apply when appointed water companies and third parties trade water with Portsmouth Water. This has been approved by Ofwat and can be found on PRT’s website and Appendix 2. Adhering to the BAF is one of the key principles of the TPC and each cross-references the other.
* *Water Resources Management Plan (WRMP),* a draft Water Resources Management Plan was published on PRT’s website in March 2018. This provides a view of the water resource situation in the Portsmouth Water region. This is further described in Section 3. The BAF underpins the efficient sourcing of water resources, demand management and leakage services to satisfy any requirements identified by the WRMP.

# Timeline for the WRMP and the Bid Process

The time line is split into 2 sections. Section 1 is the programme below which sets out the time scales for 3rd parties and incumbents to propose options which will influence the WRMP. Section 2 considers the longer term opportunities after the publication of the final WRMP.

## [Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)Section 1: Programme

5 March 2018 The Company published its Draft Water Resources Management Plan

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)5 March 2018 Start of the period for Bid Process

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)25 May 2018 Closing date for Bid submissions

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)Assessment of alternative proposals

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)31 August 2018 The Company publishes its statement of response

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)31 August 2018 WRMP is updated and submitted to Government

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)Next Stage of Procurement Process Commences

[Image result for calendar icon](https://www.bing.com/images/search?q=calendar+icon&id=0F47630DA7726D83D5500DC65C7371206EB5C9D3&FORM=IQFRBA)2018 TBC Final WRMP is published following Government Approval

## Section 2: Long-Term Opportunities

The Bid Assessment Framework remains open during the 2020-25 WRMP24 period to adopt opportunities from 3rd parties or other incumbents as they are identified. Each will be considered on their individual merit using the assessment criteria and compared to the other options detailed in the WRMP. Timescales for assessing 3rd party bids in-period will, at the very least, be aligned with those of WRMP24. However, where appropriate, such as in the case of innovative demand management and leakage services, bids may be assessed on a more rapid timeframe. This complies with PRT Trading and Procurement Code - Principle 11: Consistency with the Company’s Bid Assessment Framework.

3rd party bids for activities related to demand management and leakage services are particularly encouraged due the scope for innovation and the scale of Portsmouth Water’s planned activity in this area.

# Scope of Works

Portsmouth Water described the water resource situation in our area in the revised draft Water Resources Management Plan that was published to DEFRA in September 2019. The document sets out how we will secure resilient water supplies for our customers in the next 25 years. The document considers how much water we have available today, how much we need to supply in the future and then develop options to make up any difference. The plans are updated every five years to make sure they always reflect the latest information, innovation and customer views.There has already been a considerable amount of consultation associated with the plan which includes the views of both our customers and the Water Resources in the Southeast Group which comprises:



The Water Resources in the South East (WRSE) group will be publishing a regional Statement of Need (SoN) in February 2020. The statement will set out the water that we anticipate will be required in the future. It will be published at Water Resource Zone (WRZ) level which will provide potential third parties and new entrants the opportunity to explore the development of new solutions to meet regional and company supply demand deficits. This will not replace the company level Bid Assessment Frameworks, but it will complement them by providing potential new entrants with the regional overview of the company level requirements.

The WRMP works are split into two distinct sections. The first relates to Supply Side Schemes including works to maintain or improve the Water Resource Zone supply capacity. The second relates to demand side management to avoid or reduce network losses and reduce consumption. Detailed information is provided by the following all published on the Company’s website [www.portsmouthwater.co.uk](http://www.portsmouthwater.co.uk)

* Draft Water Resources Management Plan 2019,
* The Strategic Environmental Assessment of Draft Water Resources Management Plan, and;
* The Market Tables published on the Company’s Website [(Market Information)](https://www.portsmouthwater.co.uk/news/publications/water-resources-planning/your-water-and-its-future/), Information around supply and demand information (need) and option costs is provided in the Market Information Tables. This data is updated regularly within the WRMP period.
* PRT Trading and Procurement Code.

## Supply Side Schemes

The Company has a number of supply side schemes to maintain or improve the production capability to cope with future demand. These are listed by sources with options provided additional water either at the abstraction site or within the catchment area.

* Source O Funtington 1.8Ml/day
* Source J Worlds End 12.5Ml/day
* Source H West Street 2.0Ml/day
* Source C Northbrook 4.0Ml/day

## Demand Side Management

The company is expected to deliver a reduction in network losses of approximately 15% to achieve its leakage target of 29.5Ml/d by 2025. To that end it requires a saving of 5.4l/d as a summation of the total leakage across its supply area.

The company requires the delivery of water efficiency measures to save 1.6Ml/d by 2025. This is expected to be applied to its entire customer base.

For leakage and demand management we will remain open to solutions after the WRMP closing date if we wish to go out to the market to find other solutions.

# The Tender Process.

The Company has a defined process which can be found in Appendix 2 - Procurement Strategy. The strategy sets out the generic process applied to procurement to ensure bid assessment is objective, fair and has sufficient Governance in place. In addition, PRT’s Trading and Procurement Code (Approved by Ofwat) provides supplementary information on WRMP and water trading with which this documents complies.

The process is designed to meet a number of objectives

* Compliance with PRT Trading and Procurement Code (Approved by Ofwat);
* Compliance with the Utilities Contracts Regulations 2016 (the UCR) and any amended versions as well as attendant procurement case law and relevant guidance;
* Compliance with competition law;
* Meeting the key principles of transparency, fair-competition and non-discrimination;
* Meeting specific requirements of Ofwat’s Appendix 8: Bid Assessment Framework.
* The Bid Assessment Framework will be applied even when contracts are below the financial threshold of procurement legislation

The process outlines the key stages to be applied as follows

| **Stage** | **Purpose** | **Process** |
| --- | --- | --- |
| Project Initiation | To determine the best route to market or provision | Application of the assessment criteria and procurement strategy to determine |
| Market Sounding | This warms up the market and ensures that the requirement is known & understood.  It also enables PW to understand in response the market appetite and to explore potential solutions to be considered | Where applicable this will be commenced with a PIN notice which alerts the market of the opportunity. Where a PIN is not relevant |
| Contract Notice |  | The opportunity will be advertised openly (whether through the OJEU, on the PW website or through a relevant trade publication) |
| The Pre-Qualification Questionnaire | This stage is a shortlisting of Tenderers based on expression of interest | The pre-qualification questions are limited by the UCR and based on financial standing, technical capacity and experience alone. This process can be standardised as far as possible by use of the European Single Procurement Document and SQ (which in any event is mandated for some procurements) |
| **Governance Stage One** | Recommendation of shortlist and approval of the ITT suite | This will be recorded, together will a full report, as part of the Audit process. |
| ITT | The invitation to Tender or negotiate will invite shortlisted Tenderers to make detailed submissions | The award criteria will be informed by the Bid Assessment criteria and will be fair, transparent and non-discriminatory. The award criteria and methodology will be published with the ITT |
| Presentations | To present the solution, clarify and “bring to life” | These may or may not be scored but if they are scored this will be carefully moderated and control to ensure fair competition. |
| Evaluation and negotiation | To select the successful solution | PW will negotiate to optimise the bids and then invite (if necessary) final tenders. This is followed by the application of the published evaluation criteria and methodology by the assessors (see below) |
| **Governance Two** | **Award Decision** | This will be recorded, together with a full report, as part of the Audit process. |
| Standstill and Award | To ensure Tenderers understand and are clear as to the reasons for success or failure | This will follow the UCR procedures (if relevant). All Tenderers will be given detailed feedback. This will comply with Regulation 101 of the UCR – the requirement to provide relative advantages and scores – irrespective of whether the procurement was UCR or not. |

**Other methods of procurement**

|  |  |
| --- | --- |
| In house bids | Generally speaking in house provision will be competed against the market. However it is sometimes the case that in house provision is the more immediate, economic and efficient solution and that will be determined by applying the assessment criteria In particular the following factors are relevant:   * Has market sounding been carried out to determine whether there is industry appetite and capacity?; * Is there a willing market? * Is there a time imperative or constraint?; * Has the in house option been benchmarked recently?; * Is there in house capacity that would otherwise be under deployed?   To avoid the potential favouring of in-house solutions, it will be ensured that the in-house team is treated comparably to the market, receiving no preferential treatment and receiving equivalent information at the same time.  This will be strengthened by:   * having a separate team that has a procurement focus which will have oversight and ensure that the process is administered in a fair and transparent way * ensuring that the team developing the in-house solution are not involved in setting the precise specifications of the project or programme   We will also ensure that 3rd party bidders can be confident that any sensitive material submitted will remain confidential and in-accessible to the in-house team. We would like to make clear that:   * Any in-house solution team will not have access to sensitive information from third parties * Relevant confidentiality and non-disclosure agreements will be put in place if required |
| Frameworks | In some cases a framework may exist of suitable suppliers (e.g. Achilles or SCAPE). Before a framework call off is made, the Bid Assessment Criteria will be used to determine that the framework is appropriate, both in terms of how it was advertised, how framework contractors were selected and its terms and coverage. |
| Direct Awards | Where a procurement is of low value, it may be appropriate, economic and efficient to make a direct award (i.e. without competition). Before a contract is awarded directly, PW will consider not only the value of the works, supply or services but also the risk profile, integration with other works and the whether the contract has an interface with stakeholders and customers |

**Information**

In order to ensure equal treatment, it is important that the market at large has sufficient information to ensure equal treatment and fair competition. This will allow appropriate solutions to come forward and allow the wider industry to respond without discrimination.

As well as the use of the Achilles procurement portal, we will publish details of current and future water resource, demand management and leakage activities on our website, alongside the Market Information Platform. The online market portal will include relevant bidding information and a frequently asked question section for potential bidders.

A high level view of any 3rd party bids received will be published on the market portal and this will be refreshed at appropriate intervals throughout the 2020-25 period.

Where beneficial, we will also hold ‘Supplier Days’ to inform suppliers about significant upcoming opportunities.

3rd parties are welcome to contact us at any point, using the contact information on the website, to discuss potential solutions and to seek more information around opportunities.

We welcome feedback from 3rd parties on any additional methods of making information available that would be of use to them.

**Conflicts**

Portsmouth Water has a detailed conflicts of interest policy to ensure the integrity of the procurement process that will be applied in all cases, will ensure appropriate information barriers, ensure that the process embeds equal treatment, and; is not discriminatory.

**Assessors**

Assessors for each procurement will be assembled form in house recourses but at least one assessor will be an external consultant. Further, for major procurements, an external moderator or assurance role will be engaged, particularly if there is an in house solution.

**Feedback**

Portsmouth Water recognise the importance of providing feedback to unsuccessful bidders and we commit to providing feedback as to why bids are rejected and how this aligns with published criteria. Should timescales allow, it is hoped that this will allow 3rd parties to review their bids and consider resubmission.

**Appeal and Complaints**

3rd parties are able to appeal at each stage of the bidding process should their bid be unsuccessful. Appeals and complaints made pursuant to competition or procurement law have recourse through the courts. However before a challenge escalates to that level, PW will attempt to resolve through escalation and meditation.

Appeals and complaints that are not formal legal challenges will be handled in the first instance by Steve Morely (s.morley@portsmouthwater.co.uk) and escalated to PW Managing Director if necessary.

PW will also put in place a process for mediation by an independent assessor if necessary where there is a potential conflict (for example where an in house bid is concerned)

# Expressions of Interest

The Pre-Qualification stage is there to identify interested parties, their technical, managerial and resource capability and their current financial position. To that end, Suppliers will be asked to complete a pre-qualification questionnaire in a form broadly equivalent to the European Single Procurement Document (ESPD), which in turn is derived from the UCR 2016 (and parts of the PCR which the UCR incorporates).

The PQQ Evaluation Process is in three stages:

**PQQ Stage One - Completeness and Compliance**

An assessment will be undertaken in order to identify any applicant who shall be disqualified in accordance with the mandatory or discretionary selection criteria provided in the UCR 2016. Potential providers will also be assessed to determine that there are no irreconcilable conflicts of interest. Following confirmation that the potential Applicant is eligible to participate in the procurement process, Portsmouth Water will then establish whether the Applicant has complied with information requirements, responded to all questions and signed the relevant confidentiality and compliance undertakings. Applicants who are found not to have provided a complete and compliant response may be rejected, and those rejected will not progress to the next stage of the evaluation process.

**PQQ Stage Two** - **Detailed Assessment and Short List Selection**

All applicants that have passed the Stage One assessment will be evaluated in accordance with the detailed assessment, conducted using the responses to the sections of the PQQ seeking their experience and capacity. These sections are either pass/fail or scored and include important values such as health and safety and modern slavery.

**PQQ Stage Three - Final Assessment**

Where an Applicant has submitted a complete and compliant response as confirmed in the Stage One assessment and has been selected to progress to the Invitation to Tender stage in the Stage Two assessment, Portsmouth Water will undertake an assessment of responses to the financial suitability of the Applicant, which will be assessed upon Pass/Fail criteria.

For the avoidance of doubt, the Final stage assessment will be conducted after the Stage Two assessment and only those suppliers who Portsmouth Water intends to invite to tender will proceed to the Final stage, and this will be reflected in the information provided within the notification sent to unsuccessful applicants.

# The Tender

## Tender Evaluation

Evaluation will rarely be price alone and will balance a price/cost ratio to arrive at the most economically advantageous tender. The ITT will set out detailed criteria and sub-criteria with weightings. The criteria will be set so as to ensure equal treatment and fairness and will draw on the assessment criteria in Appendix A to the extent relevant. The criteria will be fair and proportionate. In addition to the criteria a detailed methodology will be provided and made available to all Tenderers. The evaluation will comply with this stated methodology.

The methodology will be compliant with procurement law and structured to arrive at the most economically advantageous tender. The criteria will take account of and draw from the methodology for selecting WRMP options, as described in section 1.5 of the Draft Water Resources Management Plan 2019. In order to ensure consistency and where necessary, the modelling of solutions will be by the same methodology used for the options. However, other criteria will also be applicable for selecting the successful Tenderer that are specific to the bid stage of the process (such as methodology and pricing). These criteria will be project specific but in all cases will be fair, transparent and ensure equal treatment.

## Conditions Applicable to All Stages of the Process

Following the evaluation of bids in line with the Procurement strategy, the supplier will be notified of his progression to the next stage or that they have been unsuccessful.

Portsmouth Water will reserve the right to request additional information from a supplier at any stage. Failure to provide this information could result in the bidder’s disqualification. In addition disqualification may also occur where referees cannot corroborate, validate or clarify information provided.

No information contained in this Bid Assessment Criteria or in any communication made between Portsmouth Water and any Applicant in connection with this process, will be relied upon as constituting a contract, agreement or representation that any contract shall be offered in relation to this Bid.

## Sales/ Advertising Information

No company advertising or sales information should be submitted with the response. Any information provided will not be read or evaluated.

## Bidders’ Costs

Portsmouth Water will not be responsible for any financial outlay incurred as a result of preparing the submission at this or any future stage in the process. External Tenderers participate at their own cost, risk and expense and this is normal in the procurement market.

However in order to ameliorate the market’s concerns and to ensure openness and fair competition, the following measures will be adopted:

* Tender processes will be as streamlined as possible without unnecessary stages which increase Tender costs;
* Each Tender process of any significance will be commenced with a Tenderer information day or “hot start” in order to assist the market in understanding the requirement;
* Standard documents (where applicable also market standard) will be deployed to ensure that Tenderers are able to reuse material without having to redraft standard answers (for example in relation to mandatory rejection criteria as set out in the UCR);
* Deploying Self certification and self-cleansing where appropriate in keeping with Government procurement guidance.

## Questions

All questions should be emailed directly to [s.morley@portsmouthwater.co.uk](mailto:s.morley@portsmouthwater.co.uk)

The Company will respond in line with its procurement strategy. Questions received will be circulated to other bidders along with the Company’s response.

Questions received using any other method (other than that specified above or on the company’s Market Information Portal) or to any other employee will not be answered. The questions will be logged which will be added to during the bid process.

## Protection of Commercial Information

We recognise the importance of maintaining the confidentiality of commercial information and we will designate a role within the BAF team to oversee aspects related to commercial confidentiality. Our in-house solutions team will have no access to this information. We will agree with the third party what information should be protected as commercially sensitive.

Any request for withholding of information due to perceived commercial sensitivity would be subject to scrutiny. It would not normally be acceptable for all of the information provided to be classed as commercially sensitive as this practice would be too restrictive and some of the information may be freely available in the public domain, or the information could be available from an alternative source.

The sort of information which might be classed as commercially sensitive includes pricing information such as rates, personal information such as names of individuals, patent application and customer details. We will protect the commercially sensitive information with a confidentiality or non-disclosure agreement.

This would generally be a Unilateral NDA which protects the bidder only. However, in some cases we may employ a Bilateral agreement or in cases where two or more bidders work together to provide an integrated solution we may employ a Multilateral agreement. We will put in place procedures to manage commercially sensitive information in relation to digital security of information. Access to electronic hard copy files will be within a secure area with access available only to persons with direct need for evaluation or implementation.

# Appendix 1 – Bid Assessment Criteria.

These criteria are set out here to reflect the WRMP options criteria. They also apply to the planning stages, PQQ and Award criteria but will have greater or lesser applicability to each stage. For example, information criteria will be relevant only to PQQ whereas others are more applicable to Tender evaluation.

## Bid Assessment Criteria (Supply Side)

| Information Grouping | Data Required |
| --- | --- |
| **Option Details** | Company |
| Option Name |
| Option Reference |
| Option Description |
| Resource Type (Raw/ Potable) |
| Deployable Output (Ml/d) for Dry year average and dry year critical period |
| Option earliest start date |
| location of solution and connection point into PRT network |
| Coordinates |
| An assessment of the risk and uncertainty associated with the option, including the likelihood and impact of reducing yield due to climate change, environmental constraints and the occurrence of drought |
| **Security and Resilience** | For the occurrence of drought , describe and demonstrate the resilience of the option to severe drought, including the nature and severity of droughts that have been tested; as a minimum we expect that it would provide resilience to drought with an approximate 0.5% chance of annual occurrence |
| An assessment of the flexibility of the option to adapt to future uncertainty |
| An explanation of whether the option depends on an existing scheme, or is mutually exclusive with another scheme |
| Any factors or constraints specific to the option |
| Water quality data to be provided by the bidder if they are an incumbent water company to all for a DWSP risk assessment on discoloration, nitrates, pH, and disinfection by-products, sufficient to meet the requirements of Regulation 15 of the Water Supply (Water Quality) Regulations 2016 (in England), and to allow us to undertake an assessment of the potential impact of mixing of different water types within our distribution network |
| **Operational Regime** | Description of how the option will be utilised. E.g. id the bulk export to be a 365 days per year, or is only required in drought etc Enough information on how it will be operated to allow the WRP tables to be completed. |
| **Cost Information** | Bulk Export Cost £/Ml |

| **Strategic Environmental Assessment** | **Guide Questions** |
| --- | --- |
| **1. To ensure the protection and enhancement of biodiversity, priority habitats and species** | Will the option protect and enhance priority species, habitats and sites designated for their nature conservation value? |
| Will the option protect and enhance non-designated sites and local biodiversity? |
| Will the option provide opportunities for new habitat creation or restoration and link existing habitats as part of the development process? |
| Will the option protect and enhance coastal and marine habitats and species? |
| Will the option result in a change in the quality of habitats due to changes in groundwater/river water quality or quantity? |
| Will the option affect riparian vegetation structure? |
| **2. To ensure the appropriate and efficient use of land and protect soil quality and geodiversity** | Will the option minimise the loss of best and most versatile agricultural land? |
| Will the option protect and enhance soil health? |
| Will the option minimise conflict with existing land use patterns? |
| Will the option minimise land contamination? |
| Will the option utilise previously developed (brownfield) land? |
| Will the option protect and enhance protected sites designated for their geological interest and wider geodiversity? |
| **3. To protect and enhance water quality and surface and groundwater resources and the ecological status of water bodies** | Will the option minimise the demand for water resources? |
| Will the option protect and improve surface water, groundwater and coastal water quality? |
| Will the option result in changes to river flows? |
| Will the option result in changes to groundwater levels? |
| Will the option prevent the deterioration of Water Framework Directive (WFD) waterbody status (or potential)? |
| **4. To reduce the risk of flooding** | Will the option have the potential to cause or exacerbate flooding in the catchment area? |
| Will the option have the potential to help alleviate flooding in the catchment area? |
| Will the option enhance water infiltration and retention? |
| Will the option be at risk of flooding or be affected by flooding, if it occurred? |
| **5. To limit the causes and effects of climate change and increase resilience to the consequences of climate change** | Will the option reduce vulnerability to the effects of climate change by appropriate adaptation? |
| Will the option increase environmental resilience to the effects of climate change? |
| Will the option reduce or minimise greenhouse gas emissions? |
| Will the option deliver new infrastructure that is energy efficient or makes use of renewable energy sources? |
| **6.To maintain and enhance the economic and social wellbeing of the local community** | Will the option ensure sufficient infrastructure is in place for predicted population increases? |
| Will the option create local employment opportunities? |
| Will the option support the local and regional economy? |
| Will the option ensure that an affordable supply of water is maintained and vulnerable customers protected? |
| Will the option avoid disruption through effects on the transport network? |
| **7.To ensure the protection and enhancement of human health** | Will the option ensure the continuity of a safe and secure drinking water supply? |
| Will the option ensure that surface water and bathing water quality are maintained within statutory standards? |
| Will the option adversely affect human health by resulting in increased noise and/or adverse effects on air quality? |
| Will the option affect opportunities for recreation and physical activity? |
| **8. To promote the wise use of resources** | Will the option minimise the demand for raw materials? |
| Will the option lead to reduced leakage from the supply network? |
| Will the option improve efficiency in water consumption? |
| Will the option seek to minimise the demand for raw materials? |
| Will the option reduce or minimise energy use? |
| Will the option promote the re-use and recycling of waste materials and reduce the proportion of waste sent to landfill? |
| Will the option promote the use of sustainable design and materials? |
| **9. To conserve and enhance cultural and historic assets** | Will the option conserve or enhance the historic environment, including heritage assets such as historic buildings, conservation areas, features, places and spaces, and their settings? |
| Will the option conserve or enhance archaeological sites and/or remains? |
| Will the option affect public access to, or enjoyment of, features of cultural heritage? |
| **10.To conserve and enhance landscape character and other protected features** | Will the option minimise adverse visual impacts? |
| Will the option avoid adverse effects on, and enhance where possible, protected/designated landscapes (including woodlands), townscapes or seascapes such as National Parksor AONBs be avoided? |
| Will the option affect public access to existing landscape features? |

## Bid Assessment Criteria (Demand Side)

| **Information Grouping** | **Data Required** |
| --- | --- |
| **Option Details** | Company |
| Option Name |
| Option Reference |
| Option Description |
| Type (Metering/ Leakage/ Other) |
| Option earliest start date |
| **Security and Resilience** | An assessment of the risk and uncertainty associated with the option, including the likelihood and impact of reducing yield due to climate change, environmental constraints and the occurrence of drought |
| An assessment of the flexibility of the option to adapt to future uncertainty |
| An explanation of whether the option depends on an existing scheme, or is mutually exclusive with another scheme |
| Any factors or constraints specific to the option |
| **Water Quality** | Details of how Compliance with water quality regulations will be maintained (where applicable) e.g. Water Supply (Water Quality) Regulations 2016 (in England) |
| **Operational Regime** | Description of how the option will be implemented including how data will be managed |
| **Cost Information** | Unit Cost £/Ml |
| Details of the benefits and costs and whether the option is costs beneficial |
| The environmental and social impacts of the option. Including carbon. |
| **Strategic Environmental Assessment** | **Guide Questions** |
| **1. To maintain and enhance the economic and social wellbeing of the local community** | Will the option ensure sufficient infrastructure is in place for predicted population increases? |
| Will the option create local employment opportunities? |
| Will the option support the local and regional economy? |
| Will the option ensure that an affordable supply of water is maintained and vulnerable customers protected? |
| Will the option avoid disruption through effects on the transport network? |
| **2. To ensure the protection and enhancement of human health** | Will the option ensure the continuity of a safe and secure drinking water supply? |
| **3. To promote the wise use of resources** | Will the option minimise the demand for raw materials? |
| Will the option lead to reduced leakage from the supply network? |
| Will the option improve efficiency in water consumption? |
| Will the option seek to minimise the demand for raw materials? |
| Will the option reduce or minimise energy use? |
| Will the option promote the re-use and recycling of waste materials and reduce the proportion of waste sent to landfill? |
| Will the option promote the use of sustainable design and materials? |

# Appendix 2 – Procurement Strategy References

The Company procurement strategy is given in the following documents:

|  |  |
| --- | --- |
|  | **PRT Procurement Strategy** |
|  | **PRT Trading and Procurement Code** |