



# Utilities Management Software, Metering and Ancillary Services

Framework Agreement RM3800

## Customer Guidance Notes





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## 1. Purpose of the Document

1.1. The purpose of this document is to provide guidance to customers interested in accessing the Utilities Management Software, Metering and Ancillary Services framework agreement (Reference number RM3800).

1.2. This document outlines the background to the Framework Agreement, explains the various ways in which the Framework Agreement can be used and the stages of the procurement process.

1.3. There is a '**Customer Toolkit**' available on our website in the '**Documents**' section which provides the following key documents to support you in accessing the Framework:

- Customer User Agreement Form
- Customer Guidance Document
- Framework Agreement Specification
- Further Competition Invitation Template
- Further Competition Award Criteria Template
- Customer Call Off Order Form and Contract
- Outcome Letter Templates – successful and unsuccessful



## 2. Overview of the Framework Agreement

2.1. The RM3800, Utilities Management Software, Metering and Ancillary Services framework went live on 01 April 2018 and is now available for you to use.

2.2. The Framework will run for three (3) years with an option to extend for a further twelve (12) months.

2.3. Customer Call-Off contracts can take place any time during the Framework period and you can determine the length of your call off contract. We would recommend a maximum of four (4) years in order to prevent yourself being locked out of the market for too long.

2.4. The Framework is broken down into nine (9) lots for the goods and services provided:

- **Lot 1** – Half Hourly Electricity Meter Operator Services
- **Lot 2** – Electricity Metering Services
- **Lot 3** – Gas Metering Services
- **Lot 4** – Water Metering Services
- **Lot 5** – Fuels Metering Services
- **Lot 6** – Steam Metering Services
- **Lot 7** – Heating and Chilling Metering Services
- **Lot 8** – Utilities Management Software
- **Lot 9** – Utilities Bureau Services

Full details of the scope of each lot can be found in the Framework Specification Document.

2.5. You will need to complete a Further Competition or Direct Award depending on the Lot(s) you are purchasing from. The contracting options available are outlined below:

| Lot Number | Direct Award | Further Competition |
|------------|--------------|---------------------|
| 1          | Yes          | No                  |
| 2          | Yes          | Yes                 |
| 3          | Yes          | Yes                 |
| 4          | Yes          | Yes                 |
| 5          | Yes          | Yes                 |
| 6          | Yes          | Yes                 |
| 7          | Yes          | Yes                 |



|   |    |     |
|---|----|-----|
| 8 | No | Yes |
| 9 | No | Yes |

2.6. The criteria for conducting a Direct Award and Further Competition can be found within the Framework Agreement “Framework Schedule 6: Award Criteria”

2.7. All suppliers have been appointed onto our Framework Agreement following the successful completion of a rigorous EU compliant tendering exercise.

2.8. In total, 17 suppliers were successful in winning a place on the framework agreement. The successful suppliers on each of the Lots can be found below:

| Lot | Successful Supplier(s)   |
|-----|--|
| 1   | SMS Energy Services Ltd  |
| 2   | Energy Assets Ltd<br>SMS Energy Services Ltd<br>Stark Software International Ltd   |
| 3   | Energy Assets Ltd<br>National Grid Gas PLC<br>Stark Software International Ltd   |
| 4   | Advanced Demand Side Management<br>Carbon Architecture Ltd<br>Energy Assets Ltd<br>Stark Software International Ltd<br>Scottish Water Business Stream<br>Technolog Ltd |
| 5   | Carbon Architecture Ltd<br>Stark Software International Ltd<br>Technolog Ltd   |
| 6   | Carbon Architecture<br>Enica Ltd   |



|   |  |
|---|--|
|   | Stark Software International Ltd<br>Technolog Ltd  |
| 7 | Carbon Architecture<br>Enica Ltd<br>Stark Software International Ltd<br>Technolog Ltd  |
| 8 | Carbon Architecture Limited<br>Energy Auditing Agency Ltd (TEAM)<br>Optima Energy Systems Ltd<br>SystemsLink<br>Utilidex Ltd   |
| 9 | Amaresco Ltd<br>Apollo Energy<br>Carbon Architecture Ltd<br>Optima Energy Systems Limited<br>Smith Bellerby<br>Systemslink 2000 Limited<br>Stark Software International Ltd<br>The Monarch Partnership |

2.9. This Framework Agreement is available for use by all public sector customers across the UK including Central Government and their agencies, NHS Bodies, non-departmental public bodies and Local Authorities.

2.10. Benefits of this framework include:

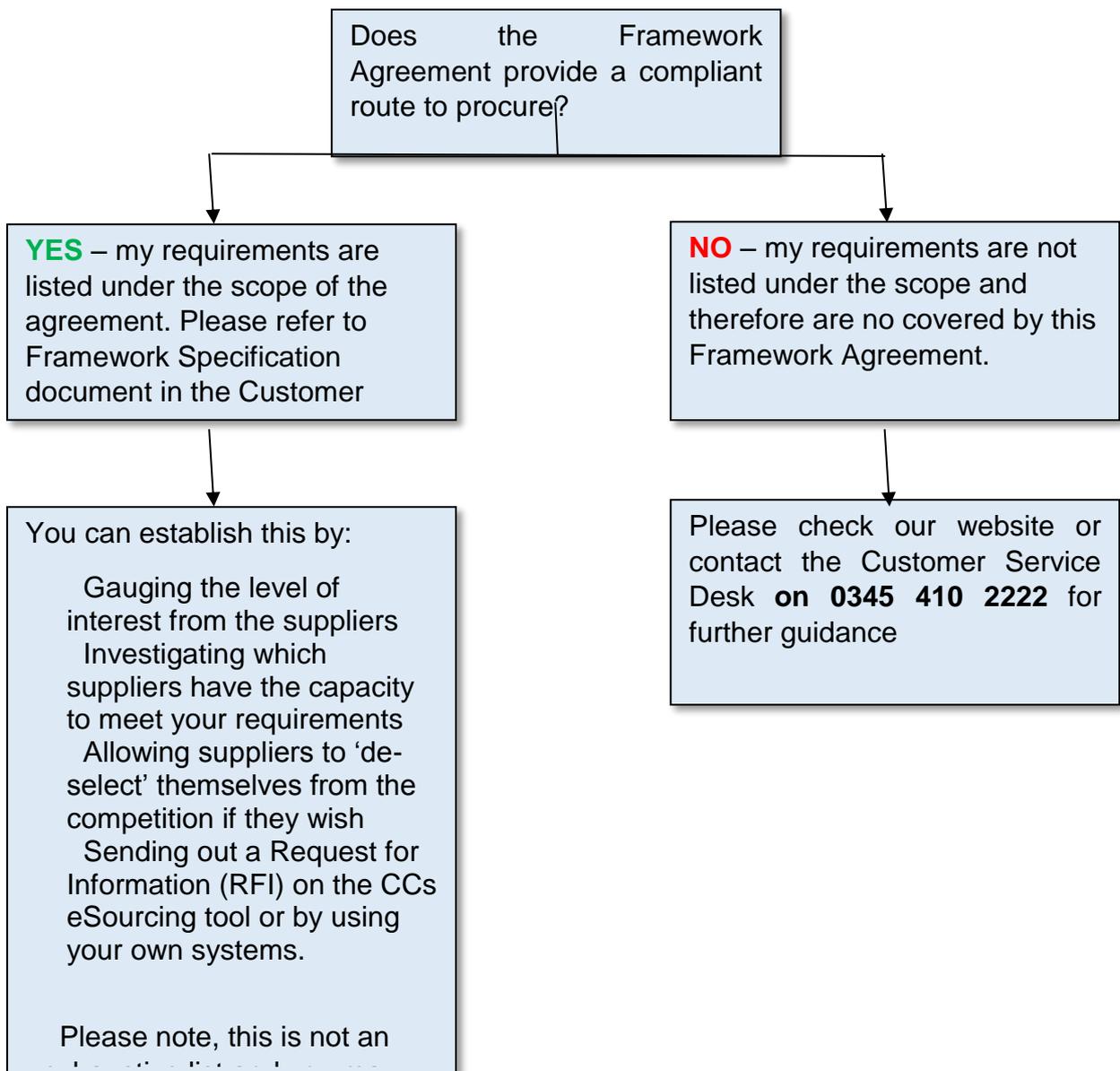
- A quicker route to market
- Quality assurance of pre-selected suppliers
- Potential reduction to cost of goods and services
- Procurement with confidence through a fully compliant offering
- Reduced procurement costs and resources
- Pre-prepared template documentation
- Pre-determined and standardised Terms and Conditions



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### 3. Accessing the Framework Agreement





3.1. You can call off this Framework by using Further Competition of Direct Award (where available) by using the CCS eSourcing tool:

[https://gpsesourcing.cabinetoffice.gov.uk/emptoris/ssso\\_login.jsp#/login/login](https://gpsesourcing.cabinetoffice.gov.uk/emptoris/ssso_login.jsp#/login/login)  
[Page](#)

3.2. If you don't have a login for the eSourcing tool, you can register here:

<http://ccs-forms.cabinetoffice.gov.uk/using-esourcing-suite-0>

3.3. You can also use your own departmental or authority documentation and procedures.

3.4. The Template Order Form and Call Off Terms are included in Schedule 4 and the Call Off procedure is outlined in Schedule 6 of the Framework Agreement.

3.5. The award criteria weightings are outlined in the table below, a more detailed breakdown can be found within the Customer Toolkit – Call Off Award Criteria.

| Lot | Price Weighting | Quality Weighting |
|-----|-----------------|-------------------|
| 1   | 80%             | 20%               |
| 2   | 60%             | 40%               |
| 3   | 60%             | 40%               |
| 4   | 60%             | 40%               |
| 5   | 60%             | 40%               |
| 6   | 60%             | 40%               |
| 7   | 60%             | 40%               |
| 8   | 40%             | 60%               |
| 9   | 40%             | 60%               |

You can vary these weightings when conducting your Call –Off agreement to suit your individual requirements.



3.6. You can determine your own evaluation criteria for your call off agreement as long as they reflect the scope of the agreement. Some suggestions are outlined below:

- Account Management
- Support Services
- Billing
- Data Management
- Hardware Provisions
- Compatibility with existing hardware/systems
- Innovation
- Social Value and Sustainability

Please note this is not an exhaustive list.

3.7. There are a number of options available when issuing your call off documents. You can use the CCS online eSourcing tool or alternatively your own departmental standard tender process. This may be hard format (paper documents) or electronic (e-tendering and email based bid process).

3.8. If you are conducting a Further Competition, you should send a Further Competition brief to all capable supplier on your chosen lot(s). This brief should include:

- A detailed **Statement of Requirements (SoR)** for the goods and/or services required.
- The award criteria and percentage weightings against which you will be evaluating and awarding the contract.
- The return date and time for proposals.



3.9. You will make your award decision by:

Applying your criteria weightings to your evaluation scores to determine the Total Score Achieved.

Ranking participating suppliers using their Total Score Achieved

Identify your successful Supplier (supplier with the highest Total Score Achieved)

Notify all participating suppliers of the outcome of your Call Off agreement

It is best practice to observe a 10 day standstill period between issuing your intention to award and awarding the contract

Provide feedback to all suppliers as to why they have been successful / unsuccessful and areas where they could improve for future reference

Place order with the successful supplier using the order form (Framework Schedule 4).



### 3.10. eAuctions

- You can utilise the use of an eAuction for Lots 2 – 9 when conducting a Further Competition to directly compete suppliers on their price to deliver savings. They can be based on price alone or a combination of price and quality.
- Crown Commercial Service eAuctions are fully managed with CCS, with a dedicated and experienced eAuction delivery team and expert category advice to help you along the way.
- The eAuction programme works to maximise commercial advantages and increase the opportunity for savings using a well proven procurement technique based on secure internet - based technology which can deliver cashable cost reductions quickly, whilst protecting quality and service levels.

To support you to drive greater efficiencies in procuring office supplies, we run eAuctions to aggregate customer spend. By agreeing to a standard service profile and aggregated core list of products, previous office supplies eAuctions have achieved in excess of 25% cost savings for customers through product standardisation, product rationalisation and aggregating spend across multiple organisations.

If you require further assistance regarding eAuctions or have any questions, please contact our eAuctions team: [info@crowcommercial.gov.uk](mailto:info@crowcommercial.gov.uk).



#### 4. Route Maps for Accessing the Framework

Access the Crown Commercial Service website at:

<https://www.gov.uk/government/organisations/crown-commercial-service>

Click “**Find and Agreement**”

In the Search box, type “**RM3800**”

Click “**Utilities Management Software, Metering and Ancillary Services**”

Click on the ‘Documents’ tab to view the Framework Agreement, order form and specification.

Decide which lot(s) best suit your requirements: refer to Section 3 above.

Decision on your preferred contracting route – Further Competition or Direct Award (where available)



##### **Further Competition**

Proceed with a further competition using the award criteria in Framework Schedule 6.

##### **Direct Award**

Proceed with a Direct Award using the award criteria in Framework Schedule 6.



## 5. Direct Award Route Map

If the option for Direct Award is available, review your requirements to determine if Direct Award is a suitable options considering:

Can the services be delivered under the scope of the agreement?

Value for money

Timescales of requirement

Specialist or niche requirements

Do the standard terms meet all of your requirements?

Assess the available suppliers on the Lot(s) you are purchasing from to determine who is best suited to provide your requirements using the criteria set out in the Call Off Contract Schedule 5 including:

Price

Technical capability

Please note, this is not an exhaustive list and you may apply your own criteria to determine the best supplier to deliver your requirements.

Once you have determined the successful supplier, both parties must sign the Call Off agreement (Framework Schedule 5).



## 6. Further Competition Route Map

Create a Statement of Requirements or Specification which outlines your requirement for goods and or services.

Provide this as part of your Invitation to Further Competition – the template for this can be found in our Customer Toolkit or you can use your own documentation.

The Invitation to Further Competition should include:

A Statement of Requirements / Specification  
Specific framework terms you wish to set

Send out an invitation to further competition to all suppliers on the relevant lots.

You can carry out your further competition either through the CCS e-sourcing suite:

[https://gpsesourcing.cabinetoffice.gov.uk/emptoris/sso\\_login.jsp#/login/loginPage](https://gpsesourcing.cabinetoffice.gov.uk/emptoris/sso_login.jsp#/login/loginPage)

Or via your own systems

The responses will give you a list of suppliers who can comply with your requirement and wish to be considered. Please note that whilst suppliers must respond to your invitation, they have the right to decline to bid

Referring to your award criteria, carry out an evaluation using more than one evaluator to apply scoring to each bid and any comments on rationale for scoring

Award the call off contract to the winning Supplier. Use Framework Schedule 4 (order form and call off terms)

Provide feedback to the unsuccessful suppliers explaining reasons for your choice and demonstrating the robustness of the further competition and assisting them to improve future bids.



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## 7. Further Information

### **CCS E-Sourcing Portal**

Guidance: <https://www.gov.uk/government/publications/esourcing-suite-guidance-for-customers>

Registration: <http://ccs-forms.cabinetoffice.gov.uk/using-esourcing-suite-0>

### **CCS Customer Service Desk**

Telephone: 0345 410 2222

Email: [utilitiesmanagement@crownccommercial.gov.uk](mailto:utilitiesmanagement@crownccommercial.gov.uk)