



# RISE

Retrofit information,  
support & expertise

# Invitation to Tender

## Quick guide

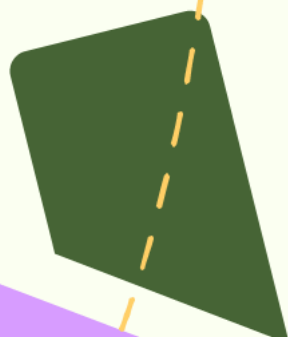
February 2025

Funded by:



Department for  
Energy Security  
& Net Zero

[www.riseretrofit.org.uk](http://www.riseretrofit.org.uk)



# Contents

Contents .....	2
What is an invitation to tender (ITT)? .....	3
Components of an ITT and bidder expectations.....	4
Key considerations for ITT .....	7
Inviting interest for procurement.....	7

# What is an invitation to tender (ITT)?

An invitation to tender (ITT) is a formal procurement document used by buyers to solicit bids from potential suppliers for a specific project or contract. While all ITTs serve the same basic purpose, they can differ in their structure and accessibility. The ITT outlines the project's requirements, scope, and evaluation criteria, and is used to generate competitive offers from potential bidders. Broadly, ITTs can be categorised into a few key types.

## Types of Tenders

### Open tenders

The open tender process begins with the contracting authority ensuring that the tender notice and associated documents provide sufficient information for suppliers to prepare their bids. The tender notice invites all interested suppliers to submit their tenders, with documents provided via a central digital platform.

After receiving tenders, the authority checks for excluded or excludable suppliers and assesses conditions of participation. Tenders are then evaluated to determine the most advantageous one. This process ensures transparency and competition, potentially leading to better pricing and innovative solutions, though it may result in a higher volume of submissions to review.

### Restricted tenders

Restricted tenders involve a two-stage process. The first stage is an Expression of Interest (EOI). The buying organisation publishes a request for EOIs, outlining the project's general scope and requesting potential suppliers to demonstrate their suitability based on pre-qualification criteria (e.g., experience, financial stability, technical capability).

After evaluating the EOIs, the buying organisation shortlists the most qualified suppliers. Only these shortlisted suppliers are then invited to participate in the second stage, which is the formal ITT. This two-stage approach streamlines the process by pre-qualifying suppliers, reducing the number of full tenders to evaluate and ensuring that only capable bidders proceed to the detailed proposal stage.

### Sole source tenders

Sole source tenders, also known as direct awards, bypass the competitive bidding process altogether. The buying organisation identifies a specific supplier that is uniquely qualified to fulfil the contract requirements, often due to specialised expertise, proprietary technology, or urgent circumstances. Instead of publishing an ITT, the organisation directly negotiates with the chosen supplier.

While quicker, sole source tenders lack the competitive pressure of open or restricted processes and require strong justification to ensure transparency and value for money. They are typically used only when strictly necessary and must adhere to relevant regulations governing direct awards.

# Components of an ITT and bidder expectations

This section explains the key components and bidder expectations common to most ITT processes and provides guidance for buying organisations on how to review an ITT. Because ITTs are often formatted as forms, with fields for suppliers to complete, this section suggests content that the client organisation could include when formulating the ITT, as well as content to expect from bidders in their returns.

## Introduction and overview

What you could include	<ul style="list-style-type: none"><li>• Provide a brief description of the project, its scope, and goals</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Confirmation of their understanding of the project and willingness to participate</li></ul>

## Instructions to bidders

What you could include	<ul style="list-style-type: none"><li>• Outline guidelines on how to respond, including deadlines and submission formats</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Adherence to the submission format, compliance with deadlines, and confirmation of understanding the guidelines</li></ul>

## Scope of work (SoW)

What you could include	<ul style="list-style-type: none"><li>• Specify the work required, tasks, deliverables, and timelines</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A detailed proposal outlining how they will complete the work, including the timeline and approach. Breakdown of deliverables and methods for achieving project goals</li></ul>

## Technical requirements

What you could include	<ul style="list-style-type: none"><li>• Define the specifications related to materials, equipment, or technical standards that must be met</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Demonstration of technical capabilities, relevant expertise, and compliance with the technical specifications. Justification for any proposed deviations</li></ul>

### Pricing structure/cost breakdown

What you could include	<ul style="list-style-type: none"><li>• Detail how costs should be structured, including materials, labour, and overheads</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A detailed cost breakdown, including all expenses related to the project, materials, services, labour, and any contingency costs. Clear pricing methodology with itemised figures</li></ul>

### Supplier credentials/experience

What you could include	<ul style="list-style-type: none"><li>• Outline the supplier's qualifications, certifications, relevant experience, and similar past projects</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A detailed portfolio or case studies of similar past projects. Proof of relevant certifications, industry experience, and capabilities. References from previous clients</li></ul>

### Legal and contractual obligations

What you could include	<ul style="list-style-type: none"><li>• Specify terms and conditions, as well as any legal obligations such as insurance, liability, and compliance requirements</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Acceptance of terms and conditions, provision of required legal documentation such as insurance certificates, and confirmation of compliance with relevant regulations and law</li></ul>

### Risk management and mitigation

What you could include	<ul style="list-style-type: none"><li>• Describe the expected approach to risk identification and management throughout the project</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A detailed risk management plan, including how they plan to identify, assess, and mitigate potential risks associated with the project</li></ul>

### Sustainability and social value

What you could include	<ul style="list-style-type: none"><li>• Outline expectations related to environmental impact, sustainability, and social responsibility</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A statement of how their proposal will contribute to sustainability and social value. Outline of any green practices, community benefits, or social responsibility initiatives</li></ul>

### Methodology/project plan

What you could include	<ul style="list-style-type: none"><li>• Provide an outline of how the project will be managed, monitored, and delivered to meet the objectives and timelines</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• A detailed project management approach, timeline, and methodology. Include resource allocation, communication plans, and performance monitoring strategies</li></ul>

### Compliance and certifications

What you could include	<ul style="list-style-type: none"><li>• Request specific certifications, regulatory compliance, or adherence to certain standards (e.g., ISO, GDPR)</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Proof of certifications and compliance with required standards. Explanation of how they ensure ongoing compliance with industry and legal requirements throughout the project</li></ul>

### Innovation and added value

What you could include	<ul style="list-style-type: none"><li>• Provide an opportunity to propose innovative solutions or offer additional value beyond the core requirements of the ITT</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Explanation of any innovative approaches or technologies they could bring to the project. Propose additional value, such as cost-saving measures or enhancements to the project scope</li></ul>

### References and case studies

What you could include	<ul style="list-style-type: none"><li>• Request evidence of successful past performance</li></ul>
What to expect from bidders	<ul style="list-style-type: none"><li>• Provide case studies, project summaries, and client references that demonstrate their ability to successfully deliver similar projects</li></ul>

# Key considerations for ITT

When preparing an ITT, it is crucial to consider several key factors to ensure a successful procurement process. These considerations help in setting clear expectations, promoting transparency, and attracting the best suppliers.

## **Understanding the market**

Consider conducting thorough market analysis to understand the landscape, potential suppliers, and industry trends. This helps to provide realistic expectations about what the market can deliver and identify potential suppliers.

## **Compliance with regulations**

Ensure that the ITT complies with local, national and industry-specific procurement regulations. This promotes fairness, transparency, and accountability in the procurement process.

## **Stakeholder engagement**

Engage with relevant stakeholders, such as end-users and technical experts, to gather input and ensure that the ITT accurately reflects the needs and priorities of the organisation.

## **Risk management**

Identify potential risks and outline how they will be managed. This helps suppliers understand the risk landscape and prepare their bids accordingly.

# Getting interest from suppliers

Effective engagement with potential suppliers is essential to attracting high-quality bids and foster competitive pricing. Without sufficient interest from suppliers, a procurement exercise may have to be repeated, leading to increased administrative and delay-related costs.

This section provides strategies for generating interest among potential suppliers, such as using pre-qualification questionnaires, public advertisement, supplier briefings, networking and outreach, clear communication, and highlighting incentives for participation.

## **Pre-qualification questionnaires (PQs)**

Consider using PQs to shortlist potential suppliers based on their qualifications, experience, and capabilities. Often used as the first in a two-stage tender process, PQs help to streamline the full tender stage by ensuring that only capable suppliers are invited to submit full tenders.

## **Public advertisement**

Advertise the ITT publicly on procurement portals, industry websites, and relevant publications. This maximises visibility and attracts a wide range of suppliers.

### **Networking and outreach**

Engage in networking and outreach activities to connect with potential suppliers. Attend industry events, join relevant professional associations, and leverage existing contacts to spread the word about the ITT.

### **Clear communication**

Ensure communication related to the ITT is clear, timely, and consistent. This includes responding to supplier queries promptly and providing updates on the procurement process.

### **Highlighting incentives for participation**

Clearly outline any incentives for participation in the ITT. This could include long-term partnership opportunities, potential for future contracts, or other benefits that would appeal to suppliers.

### **Prior Information Notices (PIN)**

Consider publishing a PIN notice in advance of a procurement activity to inform the market of the goods/services that you intend to procure. A PIN Notice is published on the Find a Tender Service and notifies suppliers to expect the procurement to begin within the next year, enabling suppliers to be better prepared for an impending tender process.

### **Issue a Request for Information (RFI):**

An RFI is a request to a supplier for more detail around their capabilities and potential capacity, it aims to better inform the contracting authority on how a supplier may deliver a project. By issuing an RFI, the procurement requirements can be refined to match the capabilities and needs of the authority and the suppliers, helping to make the tender process more competitive.

## **Useful Links**

- [Public Contracts Regulations 2015](#): Key legislation governing public procurement in the UK
- [Find a Tender Service](#): Official UK government service for publishing and finding public sector procurement notices
- [Guide to Completing an Invitation to Tender \(ITT\)](#): Detailed guide on completing ITTs, provided by the UK Parliament
- [What Should an Invitation to Tender \(ITT\) Include?](#): Comprehensive overview of essential components of an ITT
- [Contracts Finder](#): UK government portal for finding public sector contracts.
- [The PQQ Process](#): Explanation of the pre-qualification questionnaire process, including its purpose and steps involved