ENERGY SAVING TRUST

**INVITATION TO TENDER**

For the provision of specialised Energy Access consultancy services to support the Low Energy Inclusive Appliances programme and wider Efficiency for Access Coalition

REF No. EST/ITT/LEI/0524

FEBRUARY 2024

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Section 1: Introduction

1. Background to the Opportunity

**Energy Saving Trust**

Energy Saving Trust is an independent organisation dedicated to promoting energy efficiency, low carbon transport and sustainable energy use to address the climate emergency. A trusted, independent voice, we have over 30 years’ sector experience. We provide leadership and expertise to deliver the benefits of achieving carbon reduction targets: warmer homes, cleaner air, healthier populations, a resilient economy and a stable climate.

Our work addresses the challenge of reaching net zero carbon emissions by 2050 by taking action to reduce our energy consumption, install new infrastructure and accelerate a move to sustainable, low carbon lifestyles.

We empower householders to make better choices around home energy efficiency, low carbon transport and renewable energy generation.

We support businesses and community groups across the UK and internationally with strategy, research and assurance.

We deliver transformative programmes on behalf of the UK, Scottish, Welsh and Northern Irish governments to support the transition to a low carbon society.

We work with local authorities, providing support and advice to help them tailor their responses to the climate emergency. We enable everyone to play their part in building a sustainable future.

Energy Saving Trust – be part of a positive change.

**Efficiency for Access and the LEIA programme**

Efficiency for Access is a global coalition working to promote high-performing appliances that enable access to clean energy for the world’s poorest people. It is a catalyst for change, accelerating the growth of off-grid appliance markets to boost incomes, reduce carbon emissions, improve quality of life, and support sustainable development.

The Efficiency for Access Coalition is coordinated jointly by CLASP, an international appliance energy efficiency and market development specialist not-for-profit organisation, and UK's Energy Saving Trust, which specialises in energy efficiency product verification, data and insight, advice, and research.

The Low Energy Inclusive Appliances (LEIA) programme is Efficiency for Access' foundational initiative. LEIA is funded by UK aid, from the UK government via the Transforming Energy Access platform and the IKEA Foundation.

Energy Saving Trust is seeking the support of energy access experts to support the delivery of the LEIA programme. The successful candidates will work as in-house consultants, embedded within the Energy Saving Trust International team. They will support on the development of strategy, plans and activities, and seeing these through, providing their expert knowledge and access to their extensive stakeholder networks in the sector. They will provide support primarily, but not limited, to strategy and partnership activities within Workstream 1, Research & Development activities within Workstream 2 and Research activities within Workstream 3, along with wider programmatic support as needed.

* 1. The Contract

Energy Saving Trust is seeking to appoint two consultants each with a specific skill set and demonstratable experience working in Energy Access, to support delivery of the LEIA programme and wider Efficiency for Access Coalition. Energy Saving Trust is seeking to appoint one consultant into each of two Lots (see Section 2.2). This opportunity will be an open procedure advertised on Contracts Finder.

The commencement date of the project is 13 May 2024. The maximum budget available per Lot from 13 May 2024 to 29 August 2025 is between £40,000 - £50,000. If the contract extends, the maximum budget available per Lot from 13 May 2024 to 31 August 2026 is between £80,000 - £100,000.

* 1. Contract Commencement/Period

The contract is anticipated to commence from 13 May 2024 and continue in full force and effect until 29 August 2025, with a possibility to extend to 31 August 2026.

* 1. The Tender Process

Completed tenders must be submitted via the Postbox function on Contracts Finder no later than 12.00 on 29 March 2024. Energy Saving Trust takes no responsibility for any submissions either not delivered or delivered after the deadline which are not sent in accordance with these instructions. The Contracts Finder Postbox is a Third-Party Procurement Portal and Energy Saving Trust takes no responsibility for any technical issues or availability of the Contracts Finder Postbox. Please allow enough time for potential technical issues relating to submission and pose any queries in this regard directly to Contracts Finder through the portal.

Energy Saving Trust does not undertake to accept the lowest or any tender.

* 1. Procurement Timeline

The following table outlines the key dates and timescales in respect of this ITT:

|  |  |
| --- | --- |
| Publication of this ITT | 26 February 2024 |
| Deadline for ITT questions | 08 March 2024 |
| Deadline for return of tender documentation | 29 March 2024 |
| Tender evaluation | 01 April - 19 April 2024 |
| Notification of Award Decision to Tenderers | 22 April 2024 |
| Contract award | 29 April 2024 |
| Contract commencement | 13 May 2024 |

* 1. Tender Evaluation

A tender evaluation panel (the “Panel”) will assess the tenders received; a final recommendation will be made in accordance with Energy Saving Trust’s Procedures.

Evaluation of Tenders will take place in two stages. The first stage in the process will involve an assessment of whether certain "Qualification" criteria are met (see below for more details). For all Bidders that are treated as having met the relevant Qualification criteria, the second stage in the evaluation process will involve an assessment of the Tenders against certain "Award" criteria (see below for more details).

**1.5.1 Qualification Criteria – The Single Procurement Document (SPD)**

The Qualification decisions for this procurement exercise will be made according to the responses each Bidder submits in the SPD document provided as a separate additional document alongside this ITT. All Bidders are required to fill out this SPD document with accurate and up to date information. Where a question is not relevant to the Bidder's organisation or cannot be answered in full, this should be indicated, with an explanation.

The relevant Qualification criteria for this procurement exercise will be treated as having been met where all of the following apply:

­All necessary information/document has been provided or, if a particular question is not applicable or particular information cannot be provided, a satisfactory explanation has been provided and (where applicable) suitable alternative information has been provided instead;

­None of the exclusion grounds set out in Part III of the SPD apply;

­By reference to information provided at Part IV of the SPD, any supplementary information which is requested from the Bidder and any other checks (e.g. with credit reference agencies) which Energy Saving Trust considers it appropriate to carry out, Energy Saving considers that the Bidder has an adequate level of economic and financial standing for the purposes of meeting requirements under the Contract;

­By reference to information provided at Part IV of the SPD and any other checks (e.g. requests for additional information and/or references) which Energy Saving Trust considers it appropriate to carry out, Energy Saving Trust considers that the Bidder has an adequate level of technical and professional ability for the purposes of meeting requirements under the Contract.

Energy Saving Trust reserves the right, where any of the Qualification criteria for this procurement exercise are not met and/or if it is discovered at any time that any of the information provided by a Bidder (including information included in the SPD) is inaccurate, incomplete, or misleading, to disqualify the relevant Bidder and so exclude it from further participation in this procurement exercise. For these purposes, Bidders should note that Energy Saving Trust may choose not to request additional information or references as part of its initial assessment of SPD responses and so may rely, for the purposes of making a provisional decision on whether relevant Qualification criteria have been met, principally on information (including self-certification statements) made in the SPD. In these circumstances, Energy Saving Trust may then decide at a later stage in the process (e.g. where other parts of the Tender have been evaluated and a successful Bidder provisionally identified) to request additional information/references from a relevant Bidder (e.g. the Bidder provisionally identified as being the highest scoring Bidder) to verify particular information/statements in the SPD and if not satisfied with the response, to disqualify that Bidder on these grounds.

**1.5.2 Award Criteria**

The Award Criteria will be evaluated as further explained in the Evaluation Criteria set out in 1.6 of this ITT below with a view to establishing which is the most economically advantageous Tender by reference to the following criteria:

* Technical expertise
* Commercial response
* Sustainability and energy performance

As part of the evaluation process the Contract Manager may ask to meet a representative of the tenderer.

Tenderers should provide a detailed response explaining how they intend to meet the requirements set out in the Specification. Tenderers will be required to demonstrate that they have the facilities, expertise, systems and personnel in place to meet required service standards.

Energy Saving Trust reserves the right to reject and/or refrain from considering at its sole discretion any tender where the total price submitted in the response is in excess of 120% of the average of the total price of the two lowest priced tenders.

* 1. Evaluation Criteria

Submitted responses will be evaluated and scored by the panel in accordance with the following evaluation criteria and weightings:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Ref.** | **Evaluation Criteria** | **Description** | **Weighting** | **Word Count** |
| **A** | **Technical Expertise** | **60%** |  |
| A.1 | Understanding the requirement | Please describe your company’s ability to meet the requirement as detailed in the specification outlined in Section 2 of this ITT. | 20% | 750 words |
| A.2 | Staffing | Please provide CV(s) and a short description of the relevant staff, including who will be responsible for the delivery of different requirements of the Contract.CVs will not count towards the wordcount. | 20% | 250 words |
| A.3.1 | Relevant experience 1 | Please provide an example of your Company having fulfilled a similar requirement to the specification outlined in Section 2, with a focus on:* Demonstrating strong working knowledge of off-grid appliances in Sub-Saharan Africa and South-East Asia

Specifically describe your role and how this directly contributed to the outcome/impact achieved. | 10% | 400 words  |
| A.3.2 | Relevant experience 2 | Please provide an example of your Company having fulfilled a similar requirement to the specification outlined in Section 2, with a focus on either:* The Financing & Business Model Lot or,
* The Cooling Lot.

Specifically describe your role and how this directly contributed to the outcome/impact achieved.  | 10% | 400 words  |
|  | **Commercial Evaluation** | **30%** |  |  |
| B.1 | Price | Please provide a day rate as shown in Section 3. This will be evaluated in accordance with the methodology as described at section 1.7 below. | 25% | N/A |
| B.2 | Value for Money | Please demonstrate how your company offers value for money, detailing any discounts offered where applicable. | 5% | 400 words |
| **C** | **Sustainability**  | **10%** |  |
| C.1 | Sustainability | Please provide your corporate sustainability policy. Responses should comply with 1.12 of this ITT. | 5% | 500 words |
| C.2 | Energy Performance | Please provide your net zero plan/emissions reduction plan in the delivery of this contract. | 5% | 200 words |
| C.3 | Please provide your baseline emissions data using the guideline in Appendix D. **(Mandatory)** | Yes/No |  |

* 1. Scoring Methodology

**1.7.1 Technical, Commercial and Sustainability Criteria**

Each evaluator will award a mark for each question between 0 and 10, in accordance with the methodology detailed in the table below:

|  |
| --- |
| **SCORING GUIDANCE** |
| Technical responses will be evaluated using the following methodology: |
| **Score** | **Definition** | **Description** |
| 9-10 | Excellent | Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full. In addition, added value is often offered in the response. |
| 6-8 | Good | Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled. |
| 3-5 | Satisfactory | Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack minor details on how the requirement will be fulfilled in certain areas. |
| 1-2 | Poor  | Response is partially relevant but generally poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled. |
| 0 | Unacceptable  | Nil or inadequate response. Fails to demonstrate an ability to meet the requirement. |
| Evaluators can award a score between 0 and 10, which will then be multiplied or divided as appropriate to arrive at the final score for each criterion. |

A final Score out of 100 (Technical 60%, Commercial 30%, Sustainability 10%) will then be used to finalise the identification of the preferred Bidder(s) to whom a Contract may be awarded.

If a bidder fails to achieve a minimum threshold score of 50% for the overall evaluation, or if a score of zero is awarded to any of the Technical Evaluation Question responses, then this could prohibit effective contract delivery and management such that this may result in the Bidder being removed from further consideration.

Question A.3 is considered an essential requirement such that if a score of less than 6/10 (Good) is achieved for the responses in either case, then the Bid Response may be removed from the process and not evaluated further.

Question C.3 is considered an essential requirement such that if the contractor is unable to provide the information, the Bid Response may be removed from the process and not evaluated further.

**1.7.2 Commercial Criteria**

Bid prices will be scored by awarding 100% of the Commercial Score to the lowest bid, then using that lowest bid to relatively score the other bids as a percentage of the lowest.

Formula: (Lowest price / price being evaluated) x 100 = percentage of price score for that bidder

A simple worked example is shown below to demonstrate the concept (the prices are used for example purposes only and are not related to the Services described in this ITT):

|  |  |  |
| --- | --- | --- |
| **Bidder** | **Bid** | **Result** |
| A | £10 | 100% (as it is the lowest bid) |
| B | £50 | 20% ((10/50) x 100) |
| C | £100 | 10% ((10/100) x 100) |

* 1. Nominated officers

The following are the main contacts at Energy Saving Trust with regard to this Contract and tender:

|  |  |  |  |
| --- | --- | --- | --- |
| Contract Manager | Ellie Grebenik | Tel: +44(0) 7736273712 | ellie.grebenik@est.org.uk |
| Procurement Manager | David Angelini | Tel: +44(0) 7786514949 | david.angelini@est.org.uk |

* 1. Tender Queries

All queries should be submitted via the Question-and-Answer function on the Contracts Finder portal where the question text will be notified to all parties who note an interest in the opportunity through the portal upon publication of the answer. As such, please do not include any unique identifiers that relate to an organisation or an individual within an organisation, in the interest of maintaining the integrity of the procurement process. The deadline for submitting questions will be 12:00 on 8 March 2024.

* 1. Tender Documentation

Tenders must be submitted strictly in accordance with the instructions set out in this invitation to tender, including those set out in this "Introduction".

Tenders must be based on the terms, conditions and other requirements set out in the following documents:

* this "Introduction";
* the document headed "Terms and Conditions" in this invitation to tender;
* the documented headed "Specification" in this invitation to tender;
* any other documents forming part of this invitation to tender.

Energy Saving Trust may in its absolute discretion reject and/or refrain from considering any tender if:

* the tender is not submitted in accordance with the instructions set out in this invitation to tender;
* Energy Saving Trust is unable to obtain a satisfactory financial report on the bidding organisation;
* without prejudice to the generality of the foregoing, the tenderer makes or purports to make any amendment, variation or qualification to or in respect of any of the terms, conditions or requirements set out in this invitation to tender (including those set out in the documents headed "Terms and Conditions" and "Specification"), except to the extent (if at all) that any such amendment, variation or qualification is expressly permitted in writing by Energy Saving Trust (either in another part of this invitation to tender or in any subsequent document issued by Energy Saving Trust).

Tenderers must complete, sign and return with their submission in response to this invitation to tender a "Tender Compliance Form", in the form set out in Appendix B of this invitation to tender, by way of confirmation of their willingness to contract with Energy Saving Trust on the basis envisaged by this section 1.10. Other documentation which must be provided by tenderers is set out in section 1.15 below.

Additional documentation in support of the tender may be supplied as long as it is returned at the same time as and in conjunction with the other parts of the tender.

All information contained in or provided by Energy Saving Trust in support of this invitation to tender is to be treated as the confidential information of the Energy Saving Trust and must be held and used strictly subject to and in accordance with the terms of the confidentiality agreement set out in Appendix A of this invitation to tender.

* 1. NOT USED
	2. Sustainability

In compliance with legislation and to promote sustainability in our supply chains, Energy Saving Trust will place emphasis on the sustainability credentials of its Consultants, Suppliers and Contractors. Each tenderer is therefore required as part of their tender to provide:

1. Details of their sustainability certifications relating to ISO14001, ISO50001, ISO 9001, ISO 27001, B Corp (large companies).
2. Accreditation by Good Business Charter will be accepted for Small and Medium Enterprises (SMEs).
	* Proof of commencement of (ii) above will be accepted in addition to (iii) below:
3. Where the above is absent, their commitment to corporate sustainability should be declared in a corporate sustainability policy or any other relevant document covering the following environmental, social and governance (ESG) issues:
	* Environmental: this should include:
		+ Management of its impact on the environment (land, water, air and biodiversity).
		+ Management of the generation of carbon emissions, directly (scopes 1 and 2) and indirectly (scope 3).
		+ Circular economy and waste management.
		+ Any other relevant environmental aspect.
	* Social: this includes, but is not limited to:
		+ Data protection.
		+ Information security.
		+ Protection of human rights.
		+ Staff training.
		+ Payment of living wage.
		+ Staff welfare.
		+ Equality, diversity and inclusion (EDI).
		+ Health and safety.
		+ Modern slavery.
		+ Politically exposed persons (PEPs), terrorism and human trafficking.
		+ Payment of tax, value added tax (VAT) and pension (where required).
		+ Third-party payments.
		+ Declaration of conflicts of interest.
		+ Stakeholder engagement.
		+ Any other social aspect.
	* Governance: this includes:
		+ Quality management, including complaints procedure.
		+ Anti-bribery, anti-corruption and anti-money laundering (AML).
		+ Whistleblowing.
		+ Leadership diversity.
	* Any other governance aspect.

This document should be on the company’s letterhead and signed by the Chief Executive Officer (CEO), outlining the organisation’s commitment to minimising negative environmental impacts and reducing energy consumption when delivering this contract.

* 1. Not Used
	2. Freedom of Information Act

Pursuant to the Freedom of Information Act 2000 Energy Saving Trust may be required to disclose certain information to third parties and/or the public. Tenderers must notify Energy Saving Trust in writing when submitting their tenders which parts of the tender document are considered to be commercially sensitive. Please note that it is not possible to classify the whole document as non-disclosable. Failure to notify Energy Saving Trust indicates that no commercially sensitive information has been submitted.

* 1. Tender Documentation to be Provided

In support of the tender the following documentation is required:

* 1. Details of the tenderer's complaints procedure
	2. Completed Award Criteria Questionnaire
	3. Completed Schedule of Prices
	4. A duly completed and signed “Confidentiality Agreement” in the form set out in Appendix A of this invitation to tender.
	5. A duly completed and signed "Tender Compliance Form" in the form set out in Appendix B of this invitation to tender (see section 1.10 above).
	6. A duly completed and signed “No Collusion Certificate” in the form set out in Appendix C of this invitation to tender.
	7. A duly completed and signed “Guidance on Calculating Emissions” in the form set out in Appendix D of this invitation to tender.
	8. Copies of relevant insurance certificates (by way of evidence of compliance with the insurance requirements set out in the document headed "Specification").
	9. Copies of sustainability/environmental information (see 1.12 above).

A bid may be deemed to be non-compliant if any of the above documentation is missing, incomplete or inaccurate and Energy Saving Trust reserves the right at its sole discretion to reject non-compliant bids.

* 1. Warnings and Disclaimers

While the information contained in this ITT has been prepared by Energy Saving Trust in good faith and is believed to be correct at the time of issue. Neither Energy Saving Trust nor its Staff accept any liability in any circumstances for its accuracy, adequacy, or completeness (including but not limited to loss or damage arising as a result of reliance by the Bidder on the information in this ITT or any part of it), nor will any express or implied warranty be given. This exclusion extends to liability howsoever arising in relation to any statement, opinion or conclusion contained in, or any omission from, this ITT (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise made available) to any Bidder. No representations or warranties are made in relation to these statements, opinions, or conclusions. This exclusion does not extend to any fraudulent misrepresentation made by, or on behalf of, Energy Saving Trust.

In the event of any inconsistency or conflict between this ITT and any documents previously issued by Energy Saving Trust, this ITT will take precedence over any documents previously issued by Energy Saving Trust in relation to this Procurement.

Bidders should not rely on the detailed information contained in this ITT and should carry out their own due diligence checks and verify the accuracy of the detailed information contained in this ITT. If a Bidder considers that any of the Procurement Documents are deficient in any respect, any page or drawing is missing, duplicated or requires clarification, or if any words or figures are indistinct or ambiguous, the Bidder is requested to notify Energy Saving Trust via the clarification process set out in this ITT.

Neither the issue of this ITT, nor any of the information presented in it, should be regarded as a commitment or representation on the part of Energy Saving Trust (or any other person), or constitute an inducement or incentive or shall have in any other way persuaded a Bidder to submit a Bid Response or enter into a contractual arrangement.

Bidders considering entering into a contractual relationship with Energy Saving Trust should make their own enquiries and investigations of Energy Saving Trust’s requirements beforehand. The subject matter of this ITT shall only have contractual effect when and to the extent it is contained in the express terms of an executed contract.

Any costs incurred in the creation and the preparation of any Bid Response, in establishing legal entities or otherwise in connection with this Procurement will be the responsibility of the Bidder and will not be borne by Energy Saving Trust, including (but without limitation) if this Procurement is terminated or amended by Energy Saving Trust for any reason.

* 1. Relevant Legislation

**Equality Act**

Energy Saving Trust requires all suppliers delivering services on our behalf, to comply with the Equality Act 2010.

**United Kingdom National Living Wage**

Energy Saving Trust is committed to ensuring that those employed to deliver contracts on their behalf are paid what they need to live rather than just the national minimum wage.

Further information on the amounts and rationale can be found at the following link: The National Minimum Wage in 2023 - GOV.UK (www.gov.uk)

**Employers' Liability Insurance**

The Employers’ Liability (Compulsory Insurance) Act 1969 requires employers to have at least £5 million of cover (more depending on the business activity). Employers’ liability insurance is compulsory because employers are responsible for the health and safety of their employees while at work.

**Pensions**

Under the Pensions Act 2008, every employer in the UK must put certain staff into a workplace pension scheme and contribute towards it. The cost of this obligation must be factored into the pricing submitted as part of this Procurement.

**Health and Safety at Work**

Energy Saving Trust requires all Consultants delivering services on our behalf, to comply with the Health and Safety at Work Act 1974 by producing a written Health and Safety Policy and Risk Assessments.

**Freedom of Information**

Pursuant to the Freedom of Information Act 2000 Energy Saving Trust may be required to disclose certain information to third parties and/or the public. Bidders must notify Energy Saving Trust in writing when submitting their Bid Responses which parts of the Bid Response are considered to be commercially sensitive. Please note that it is not possible to classify the whole document as non-disclosable. Failure to notify Energy Saving Trust indicates that no commercially sensitive information has been submitted.

**Data Protection**

If a contract resulting from this Procurement would involve a Bidder handling any such personal data, a Bidder must comply with the Data Protection Act 2018 requirements.

**Social Value**

The Public Services (Social Value) Act 2012 places a duty on public procurements to improve the economic, social and environmental well-being in communities in England and Wales.

* 1. Organised Crime and Modern Slavery

Organised crime is serious crime that is planned, coordinated, and conducted by people working together on a continuous basis where the most common motive is financial gain.

It is usually characterised by threats of violence and using bribery and corruption; often implemented using sophisticated technology and negligent professionals.

Organised crime includes illegal drugs, firearms, fraud and financial crimes, money laundering, child sexual exploitations, organised immigration and human trafficking, cyber-crime, and organised acquisitive crime.

Energy Saving Trust is committed to only working with companies who are not involved in activities categorised above; Bidders will be required to confirm that they are not involved in such activities as part of completing the vetting process and are advised that should such activities be identified after the award of the Contract, regardless of when those activities took place, that Energy Saving Trust will have the right to terminate the Contract with immediate effect without liability and no compensation or other payment will be due or payable to the contractor/Bidder.

Please use the following link to ensure that you have a comprehensive understanding of what is covered by this requirement: <http://www.nationalcrimeagency.gov.uk/> and the Modern Slavery Act 2015, before confirming that you are not involved in such activities.

* 1. Abnormally Low or High Pricing and Price Manipulation

Energy Saving Trust places significant importance on the quality assessment element of this Procurement and accepts that to achieve good quality may impact a Bidder’s quoted price.

Where Energy Saving Trust has concerns regarding sufficiency of price, it reserves the right to seek clarification and, should a Bidder’s clarification prove insufficiently reassuring, Energy Saving Trust reserves the right to disqualify the Bid as inadequate or incomplete. In contracts where appropriate and sufficient staff resourcing is a significant risk consideration, Energy Saving Trust may require Bidders to explain their prices as part of their Bid (by way of a scored Method Statement Questions) to facilitate the evaluation process.

Where this information is not supplied, or the information does not satisfactorily account for the low prices Energy Saving Trust reserves the right to reject the Bid as abnormally low, insufficient, or incomplete.

Where this information is requested as a Technical Question, it will take the place of asking Bidders to explain their prices or costs after submission of their Bid Responses; failure to have provided this will likely lead to the Bid being deemed incomplete.

**Section 2 – Specification**

* 1. Summary of Requirements

This specification outlines Energy Saving Trust’s requirement. No substitutions or variations to this requirement are acceptable without the express agreement of Energy Saving Trust.

2.1.1 Background and Contract Detail

**2.1.1.1 About the LEIA Programme**

Efficiency for Access is a global coalition working to promote high-performing appliances that enable access to clean energy for the world’s poorest people.

It is a catalyst for change, accelerating the growth of off-grid appliance markets to boost incomes, reduce carbon emissions, improve quality of life, and support sustainable development.

Efficiency for Access consists of 20 Donor Roundtable Members, 19 Programme Partners, and more than 30 Investor Network members. Current Efficiency for Access Coalition members has programmes and initiatives spanning 62 countries and 34 key technologies.

The Efficiency for Access Coalition is coordinated jointly by CLASP, an international appliance energy efficiency and market development specialist not-for-profit organisation, and UK's Energy Saving Trust, which specialises in energy efficiency product verification, data and insight, advice, and research.

The Low Energy Inclusive Appliances (LEIA) programme is Efficiency for Access' foundational initiative. LEIA is funded by UK aid, from the UK government via the Transforming Energy Access platform and the IKEA Foundation.

**2.1.1.2 Opportunity**

Energy Saving Trust is seeking the support of energy access experts to support the delivery of the LEIA programme. The successful candidates will work as in-house consultants, embedded within the Energy Saving Trust International team. They will support on the development of strategy, plans and activities, and seeing these through, providing their expert knowledge and access to their extensive stakeholder networks in the sector. They will provide support primarily, but not limited, to strategy and partnership activities within Workstream 1, Research & Development activities within Workstream 2 and Research activities within Workstream 3, along with wider programmatic support as needed.

This opportunity comes in two Lots:

1. Financing and business models expert.
2. Cooling expert.

One Consultant will be appointed to deliver the requirements in each Lot; details are in 2.2 below.

* 1. Details of Lots

 **2.2.1 Lot 1 – Financing & Business Models Expert**

**Objectives / Scope of Work**

**Support for strategy, policy and partnerships activity – Workstream 1**

* Serve as ‘go to person’ for coordinating LEIA’s work with innovative business models and financing mechanisms to ensure no one gets Leave Behind by:
	+ Supporting with the design of new concepts and programmatic activities relating to finance and business models
	+ Sharing new research, programmes and opportunities with the LEIA team relating to innovative business models and financing, identifying potential opportunities for leveraging opportunities and creating new partnerships.
	+ Bringing private sector and others perspective and considerations into programme development and implementation.
* Provide sector expertise and guidance to the LEIA team specifically on a range of off and weak grid technology and activity including, but not limited to:
	+ Sharing new research, programmes and opportunities with the LEIA team.
	+ Identifying opportunities to leverage relationships and develop new partnerships.
	+ Maintaining a strong understanding of the LEIA offering to align and maximise linkages with wider sector developments.
	+ Share insights and developments relevant to the implementation of LEIA and EforA Coalition
* Bring specific country and policy perspective and considerations into programme development and implementation.
* Provide advice on areas such as repairability, interoperability, maintenance and e-waste to the LEIA management team
* Support on the identification and development of strategic partnerships.
* Support with the design and development of new concepts and programmatic activities relating to off-grid appliances.
* Provide sector expertise and guidance to the LEIA team on a range of activity and strategic input for the Efficiency for Access Coalition development
* Support identification of and outreach to programme partners, identifying synergies and facilitating collaboration among Efficiency for Access donor coalition members and operational partners.
* Support the Energy Saving Trust Team on cross workstream coordination and collaboration, ensuring linkages are exploited / maximised
* Delivery of capacity building activities on key areas to develop LEIA team’s familiarity and expertise in off- grid energy access and low energy inclusive appliances
* Provide specialised off-grid energy access industry knowledge and expertise to inform and guide programme development and implementation including sharing relevant news/updates on off-grid sector.

**Support for the LEIA research activity – Workstream 2**

* Provide support to research with a focus on strategy development and policy research,
* Provide technical support on the conceptualisation, development and delivery of research projects helping to steer and advise the LEIA research team
* Review and provide detailed feedback and input on research outputs as required
* Provide hands-on support, when required, to research. For example, co-authoring reports.
* Identify and provide strategic inputs into research projects that are crosscutting between wider LEIA and sector activity and research
* Provide mentoring support and guidance to the research team
* Peer review both internal and external relevant papers as required / requested

**Requirements**

Essential:

* A strong understanding of the energy access funding landscape and enabling environment.
* A deep knowledge and understanding of off-grid technology and market barriers / solutions, with a focus on Sub Saharan Africa and South Asia
* Technical knowledge of products and enabling technologies suited to off-, weak- and mini-grid settings in the energy access sector
* Experience working with innovative business models and financing mechanisms
* Knowledge of specific country and policy implications across Sub Saharan Africa and South Asia
* Demonstratable knowledge of the Efficiency for Access Coalition and Low Energy Inclusive Appliances programme
* Established network of relationships with programme implementers, private sector actors and academia in the energy access sector
* Experience working on government and international funded programmes such as FCDO and Ikea Foundation
* Experience designing and delivering large scale energy access programmes for the Global South
* Experience working in international teams and coordinating international partnerships
* Excellent stakeholder engagement skills
* At least five years' experience working in energy access sector
* At least two years working on financing and business model initiatives and programmes focused in the Global South
* Adhere to Energy Saving Trust’s standard terms and conditions

Desirable:

* A deep knowledge of the history, aims and objectives of the Efficiency for Access Coalition and Low Energy Inclusive Appliances programme
* Knowledge of repairability, interoperability, maintenance and e-waste considerations

 **2.2.2 Lot 2 – Cooling Expert**

**Objectives / Scope of Work**

**Support for strategy, policy and partnerships activity – Workstream 1**

* Provide sector expertise and guidance to the LEIA team specifically on a range of cooling activity including, but not limited to:
	+ Sharing new research, programmes and opportunities with the LEIA team relating to Cooling
	+ Identifying opportunities to leverage relationships and develop new partnerships.
	+ Maintaining a strong understanding of the LEIA offering on cooling to align and maximise linkages with wider sector developments.
	+ Share insights and developments relevant to the implementation of LEIA and EforA Coalition
* Serve as ‘go to person’ for facilitating engagement between LEIA programme and key stakeholders in the development, energy access, cooling and agriculture sectors
* Review and contribute to reports and market intelligence resources.
* Bring private sector perspectives and considerations into programme development and implementation.
* Provide private sector companies with programme updates and guidance on navigating their engagement / coordinating with the LEIA programme and wider sector initiatives.
* Support the Energy Saving Trust Team on cross workstream coordination and collaboration, ensuring linkages are exploited / maximised.
* Delivery of capacity building activities on key areas to develop LEIA team’s familiarity and expertise in off- grid energy access and low energy inclusive appliances
* Provide specialised off-grid energy access industry knowledge and expertise to inform and guide programme development and implementation including sharing relevant news/updates on off-grid sector.

**Support for the LEIA research activity – Workstream 2**

* Provide technical support on the conceptualisation and development of research projects delivered by the LEIA research team
* Review and provide input on research outputs as required
* Identify and provide strategic inputs in action research projects that are crosscutting between R&D and research
* Provide mentoring support and guidance to the research team
* Peer review both internal and external relevant papers as required / requested

**Support for the LEIA R&D activity – Workstream 3**

* Identify ways to extend the package of support offered to R&D Grantees by identifying new stakeholders in the off and weak grid appropriate eco-system and developing wider partnerships.
* Support with the design and delivery of new funding calls, including but not limited to:
	+ Providing input into the scoping phase including understanding the wider eco-system of funding packages available
	+ Being an expert in the field to answer specific technical questions, engaging directly with applicants where required
	+ Reviewing applications and providing detailed feedback and evaluation
	+ Supporting other reviewers (both internal and external) with expertise and knowledge of the sector
	+ Providing expert steer on the allocation of funding
	+ Join kick-off meetings with grantees, with the aim of facilitating wider partnership engagement and opportunities
* Provide technical and business model expertise to the programme team and grantees, including coordinating technical assistance in this area with sub-contractors
* Identify and provide partnership and facilitate support for R&D grantees to maximise the outcomes of projects supported under the R&D Fund
* Assist in implementation of the LEIA programme, with a specific focus on advising R&D staff on management and coordination of the grantees
* Provide mentoring, advisory, and strategic guidance to the R&D Team.

**Requirements**

Essential:

* + A strong understanding of the energy access funding landscape and enabling environment.
	+ A deep knowledge and understanding of off-grid technology and market barriers / solutions, with a focus on Sub Saharan Africa and South Asia
	+ Technical knowledge of products and enabling technologies suited to off-, weak- and mini-grid settings in the energy access sector
	+ Expert knowledge in cooling specific technologies
	+ Demonstratable knowledge of the Efficiency for Access Coalition and Low Energy Inclusive Appliances programme
	+ Established network of relationships with programme implementers, private sector actors and academia in the energy access sector
	+ Experience working on government and international funded programmes such as FCDO and Ikea Foundation
	+ Experience designing and delivering large scale energy access programmes for the Global South
	+ Experience working in international teams and coordinating international partnerships
	+ Excellent stakeholder engagement skills
	+ At least five years’ experience working in energy access sector
	+ At least two years working on Sustainable Cooling initiatives and programmes focused in the Global South
	+ Adhere to Energy Saving Trust’s standard terms and conditions

Desirable:

* + A deep knowledge of the history, aims and objectives of the Efficiency for Access Coalition and Low Energy Inclusive Appliances programme
	+ Experience working on Grant Funds
	1. Role of the Contractor

The consultant is expected to work a varying number of days each month, approximately 2-10 days a month as required.

* Will provide support in the delivery of the LEIA programme as detailed in the Objectives / Scope of Work
* Will help establish new connections to potential partners, clients or funders where appropriate as detailed in the Objectives/Scope of Work
* Will complete all other tasks as requirements as detailed in the Objectives / Scope of Work
	1. Role of Energy Saving Trust
* Will provide advice and guidance to the contractor as necessary to enable them to perform the services required.
* Will provide any necessary background of the LEIA programme in order to help the contractor perform the services as required.
	1. Conflict of Interest

 In the event of any potential or actual conflict of interest coming to the attention of any applicant to this tender at any point in the process, the applicant will fully disclose all details of the conflict to Energy Saving Trust along with any appropriate mitigating measures for its consideration.

Energy Saving Trust will infer a commitment to transparency, professionalism and a fully ethical approach to the tender process from the submission of any response to this tender and from the signing of any resultant Contract.

* 1. Complaints Procedure

 The Contractor will have in place a Complaints Procedure that will be approved by the Contract Manager, prior to the commencement of the Contract.

* 1. Quality Control

The Contractor is invited to provide evidence of their quality control processes.

The contractor is also invited to provide detail and evidence of their commitment to continual service improvement and how they might employ their methods in the delivery of this contract.

* 1. Contract Management

 Both Parties will appoint an experienced and proactive Contract Manager who will have overall responsibility for the Contract. Both Parties will ensure that:

(a) the Contractors Contract Manager or his or her duly authorised deputy consults with Energy Saving Trusts Contract Manager and such other personnel as may from time to time be specified by Energy Saving Trust as often as may be reasonably necessary for the proper performance of the Services; and

(b) the Contractors Contract Manager or his or her duly authorised deputy informs Energy Saving Trust promptly and in writing of any acts or omissions on the part of Energy Saving Trust or any of its staff which prevent or hinder, or may prevent or hinder, the Contractor from performing its obligations under the Contract.

* 1. Meetings

 The Account Manager will be required to attend regular meetings with the Contract Manager at a frequency and location to be decided by the Contract Manager. Attendance at such meetings will be at no additional cost.

* 1. Insurance

 The Contractor must hold, and provide evidence to the Contract Manager prior to the commencement of the Contract, of an adequate limit of cover required to deliver the Contract services in the following areas:

* Professional Indemnity Insurance cover
* Employers Liability Insurance cover
* Public Liability Insurance cover

Such insurance cover to be provided throughout the length of the Contract, the Contract Manager being kept appraised of any changes.

* 1. Sustainability and Environmental Management

The Contractor is required to:

* Provide evidence of having in place environmental procedures which mitigate negative environmental impacts.
* Provide its latest (previous year) carbon emissions data
* Where this is not available, the Contractor will be required to provide this data within six months of Contract commencement (for contracts with delivery period above six months).
* Guidance on calculating this is provided in Appendix D of this ITT.
* If possible, provide an estimate of carbon emissions to be generated in the delivery of this contract.
* Provide a net zero plan/carbon emissions reduction plan in the delivery of this contract.
* Provide Good Business Charter accreditation (SMEs) within twelve months of Contract commencement (for contracts with delivery period above twelve months).
* Attend Supplier Day events to collaborate on achieving the net zero emissions target of Energy Saving Trust.

The Contractor will actively manage, review and revise their sustainability and environmental strategy in order to maximise the impact its organisation can make.

* 1. Audits

 Energy Saving Trust reserves the right to audit the Contractor against the requirements of the Contract. The scope and timing of the audit will be agreed in advance with the Contractor by the Contract Manager. On completion of the audit, the auditor will discuss any findings resulting from the work with the Contractor and agree actions and timetable for rectification and sign-off.

Section 3 – Schedule of Prices

**3.1 Overview of Fees**

 There will be no facility to revise prices – the price is to be fixed for the whole period of the contract.

 All Fees and costs must be described and invoiced in Pounds Sterling (£). These submitted rates and prices are deemed to include all costs, insurances, fees, expenses, liabilities, obligations risk and other things necessary for the performance of the Contract. Any charge not stated here as being additional, will not be allowed as a charge against any transaction under the Contract.

Day rate only is to be charged. Expenses such as travel will be reimbursed only on a case-by-case, pre-approved basis.

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** | **Unit** | **Tendered price** | **Total** |
| Day rate | 7.5 hours |  |  |

Signed:……………………………………………… Date:………………..……

Print Name :………………………………………… Position in Company …………………………………

For and on behalf of (name of Tenderer):

……………………………………….…………………………………………

Address :………………………………………………………………………….…….

………………………………………………………………………………………………

Telephone No. :………………………………… E-mail address :……………………………………….

**3.2 Invoicing**

Invoices should be submitted in the first 5 working days of each calendar month. Invoices should include details of activities and time spent on them.

 The Contract Manager may require the Contractor to supply a full breakdown of expenditure relative to a specific invoice. This may include:

* Timesheets
* Copies of invoices paid by the Contractor
* Travel expenses

Invoices should include;

* Invoice date, due date
* Invoice number
* Energy Saving Trust address
* Company name, address and contact details
* Payment details - account name, account number, routing number, SWIFT (if applicable)
* Description of work/relevant milestone
* Currency (in Pounds Sterling)
* Unit price, VAT (if applicable), and invoice total
* A Purchase Order (PO) number from Energy Saving Trust

**3.3 Payment milestones**

Payments will be made monthly in arrears, on submission of approved invoices throughout the lifetime of the contract.

**Section 4 – NOT USED**

**Section 5 - Terms and Conditions**

The terms and conditions upon which the Contract must be made are provided alongside this ITT as a separate document.

APPENDICES

**Appendix A**

CONFIDENTIALITY AGREEMENT

In return (amongst other matters) for receiving the attached contract documentation (the "Documentation") from Energy Saving Trust Ltd ("Energy Saving Trust"), you, the prospective contractor identified below, agree as follows:-

1. For the purposes of this confidentiality agreement: (1) "Confidential Information" includes the content of the Documentation and any other information and data relating to Energy Saving Trust and its affairs (of whatever kind and in whatever form) which may come into your possession as a result or in the course of receiving the Documentation and/or tendering for or performing the contract envisaged by the Documentation (the "Contract"); and (2) "Personnel" includes any employees and agents of yours or your sub-contractors or advisers (if any).
2. You shall safeguard and treat in the strictest confidence all Confidential Information, shall only use that information for the purposes of considering and (if successful in your tender) performing the Contract and shall not disclose any such information to any third party save for those Personnel who have a need to see such information for the above-mentioned purposes. These obligations shall not apply however in respect of any Confidential Information that is or becomes publicly available (other than through your default) or to the extent that you are required to disclose any Confidential Information by law.
3. You shall procure that all Personnel (and their respective employers, if not you) to whom any Confidential Information is disclosed comply in relation to that information with confidentiality obligations equivalent to those imposed by this agreement and, if so requested by Energy Saving Trust at any time, that any or all of those Personnel or employers enter into a direct confidentiality agreement with Energy Saving Trust in a form similar to this agreement.
4. You shall not remove and shall ensure that your Personnel do not remove from Energy Saving Trust’s premises without Energy Saving Trust's express written authorisation any materials, documents, books, papers, disks, tapes or other records (in whatever medium) which belong to or are in the possession of Energy Saving Trust, including any copies of any such materials etc.
5. You shall not mention or disclose any information as to the existence or contents of the Documentation or any contract or memorandum of agreement related to it in any journal, magazine or other publication (of whatever kind) without the prior written consent of Energy Saving Trust, which consent may be withheld or subjected to certain conditions at Energy Saving Trust’s absolute discretion.

The provisions of this confidentiality agreement shall survive any rejection of your tender for the Contract and the conclusion, termination, cancellation or expiry of the Contract or any related memorandum of agreement.

Signed by: ………………………………………………………………………………….…

Print Name:……………………………………………………………………………………

Position:………………………………….……………………………………………………

Contractor Name:…………….…………………………………………………………..……

Date:…………………………….…………………………………………………..…………

TENDER COMPLIANCE FORM

**Appendix B**

Full name, registered number (if applicable) and address of the tenderer to be set out below:

Full (registered) name: ………………………………………………………………………………

Registered number (if applicable):-………………………………………………………………….

Address:-………………………………………………………………………………………………..

…………………………………………………………………………………………………

We, the tenderer named above, refer to the invitation to tender issued by Energy Saving Trust Limited in respect of providing Energy Access consultancy services to support the Low Energy Inclusive Appliances programme and wider Efficiency for Access Coalition and acknowledge and agree as follows:-

1. Our tender in response to that invitation to tender constitutes an unconditional and irrevocable offer by us to provide to Energy Saving Trust, on the basis of the prices set out in our tender and in accordance with the terms and conditions set out in the invitation to tender (including those set out in the document headed "Terms & Conditions") the services set out in the invitation to tender (including all those envisaged by the document headed "Specification").

2. The offer referred to in paragraph 1 above will remain open and capable of acceptance by Energy Saving Trust for a period of 90 (ninety) days from the date on which our tender is delivered to Energy Saving Trust. Unless and until a further formal agreement is prepared and executed, any express written acceptance by Energy Saving Trust of that offer will create a binding contract between us and Energy Saving Trust for provision of the services, and incorporating the terms and conditions, referred to in paragraph 1 above.

Signed for and on behalf of the Contractor

………………………………………………...

Name of Signatory

………………………………………………...

Date…………………………………………..

**Appendix C**

NO COLLUSION CERTIFICATE

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

* 1. communicating to any person the amount or approximate amount of the tender herewith submitted;
	2. entering into any agreement or arrangement with any person that he /she shall refrain from tendering or as to the amount of any tender to be submitted; and,
	3. offering or paying or giving or agreeing to pay or give any sum of money or consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above.

In this certificate, the word "person" includes any persons and any body or association, corporate or incorporate; and "any agreement or arrangement" includes any such transaction, formal or informal, whether legally binding or not.

Signed by: ………………………………………………………………………………….…

Print Name:……………………………………………………………………………………

Position:………………………………….……………………………………………………

Contractor Name:…………….………………………………………… **Date:……………………………**

**Energy Saving Trust**

**Appendix D**

**Guidance on calculating emissions of provided services or products**

Energy Saving Trust, in common with many other businesses, annually calculates the greenhouse gas emissions of our operations. This includes our energy use, utilities, buildings, staff travel, and procurement. In order to accurately calculate emissions from procurement, we now require annual data on the greenhouse gas emissions of the goods and services we procure from suppliers.

As such a supplier, we are requesting your support in providing this information. This short document aims to summarise what we require, and to assist you in providing this information. Other customers may have already requested this information, and are likely to do in future, so knowing this information is a benefit to your business.

**Summary flowchart:**



**What do we require?**

We need to know the emissions associated with the service(s) or product(s) we procure from you, in units of Carbon Dioxide equivalent (kgCO2e or tCO2e).

**How can we get this information?**

We are able to collect this information in one of two ways:

1. The specific greenhouse gas emissions of the product or service, if known.
2. Calculated from your total organisation greenhouse gas emissions.

The specific emissions of the product or service (option 1) may be known if you have undertaken work to calculate this information, such as product Life Cycle Assessment. If you have not consciously undertaken this calculation, it is unlikely you will have this specific information.

In this case, we can use your total organisation emissions and allocate a proportion of this to the product or service we procure from you. This allocation is normally done based on the amount we spend with you as a proportion of your total turnover.

**How do you calculate your total organisation greenhouse gas emissions?**

You may already calculate your emissions, for example if you are required to submit to SECR or a similar emissions reporting scheme. If you are not currently required to do so, you can undertake an estimate of your emissions.

Emissions are defined in three “Scopes”. These describe the level of control you have over the emissions.

* Scope 1 deals with direct use of fuel, so includes gas or other fuel used in boilers, and fuel used in company-owned vehicles.
* Scope 2 covers purchased energy. For most businesses this is your electricity consumption.
* Scope 3 covers all other sources of emissions, and includes purchased goods, employee travel and business travel in non-owned vehicles or public transport. Scope 3 emissions are challenging to calculate in full.

In order to calculate the emissions associated with the product or service we procure from you, we require only your Scope 1 and Scope 2 emissions. Scope 3 emissions calculation is likely to be of long-term benefit to your business, and may be requested by customers in future, but is not required by Energy Saving Trust at this time.

**How can you calculate Scope 1 and Scope 2 emissions?**

There are three options for this calculation. These are: to use an online calculation tool, to undertake the calculation yourself, or to employ a consultant to undertake the calculation.

1. To use a calculation tool, you will need to know your total consumption of gas or any other fuel, company-owned vehicle fuel consumption, details of any refrigeration equipment repaired or installed, and your total electricity use, for a period of one year (normally your last financial year). A number of tools exist, and some are available for free use. Though not provided by Energy Saving Trust, we suggest the following tools may be useful:
2. [SME Carbon Footprint Calculator | The Carbon Trust for businesses](https://www.carbontrust.com/our-work-and-impact/guides-reports-and-tools/sme-carbon-footprint-calculator)
3. [Start measuring - SME Climate Hub](https://smeclimatehub.org/start-measuring/)
4. To undertake the calculation yourself, you will need to know the same information, for a period of one year (normally your last financial year). The calculation involves multiplying each value by the relevant emission factor provided by the Department of Energy Security and Net Zero. This method is likely to be more time-consuming than using a calculation tool or consultant, so is only recommended if you wish to undertake the calculation yourself for a specific reason. If you undertake your calculation, please provide a summary of the calculation stating units and factors used.
5. If you require a more detailed calculation, wish to include Scope 3 emissions, or your business is too large and complex to undertake your own calculations or use a tool, employing a consultant is likely to be a suitable route. Energy Saving Trust offers this service, as do many other consultancy organisations.

**How should you present the results?**

Once you have calculated your Scope 1 and 2 emissions for the preceding financial year, you will need to present this information as either a total emissions value in tCO2e, or in the form of an emissions-per-pound metric. This metric is calculated by dividing your total Scope 1 and Scope 2 emissions by your turnover, to give a number in tCO2e/£. We can then use this figure to include the emissions from your products and services in our own emissions calculations.

**When should you recalculate your emissions?**

You should calculate your Scope 1 and 2 emissions for each financial year and provide the results of the calculation to Energy Saving Trust at the end of each financial year.

If you have any questions on the process or would like to discuss Energy Saving Trust undertaking emissions calculation on your behalf, please contact us at business@est.org.uk

Please confirm compliance with this guidance in this tender exercise and during contract delivery.

**Signed by: ………………………………………… Print Name……………………………………**

**Position………………………………….…… Contractor Name…………….…………………………**

**Date…………………………….**