DPS FRAMEWORK SCHEDULE 4: LETTER OF APPOINTMENT AND CONTRACT TERMS

Part 1: Letter of Appointment

To whom it may concern,

Letter of Appointment

This letter of Appointment dated Friday 10th September 2021, is issued in accordance with the provisions of the DPS Agreement (RM6018) between CCS and the Supplier.

Capitalised terms and expressions used in this letter have the same meanings as in the Contract Terms unless the context otherwise requires.

Order Number:	PS21099
From:	**Department for Business, Energy & Industrial Strategy (BEIS)** of 1 Victoria Street, Westminster, SW1H 0ET ("Customer")
To:	**IFF Research Ltd,** Floor 5, St Magnus House, 3 Lower Thames Street, London, EC3R 6HD ("Supplier")

Effective Date:	Monday 13th September 2021
Expiry Date:	End date of Initial Period Friday 25th March 2022

Services required:	Set out in Section 2, Part B (Specification) of the DPS Agreement and refined by: the Customer's Project Specification attached at Annex A and the Supplier's Proposal attached at Annex B;

Key Individuals:	[redacted]

Contract Charges (including any applicable discount(s), but excluding VAT):	The Customer shall pay the Supplier the sum of £276,945.87 (excluding VAT) for delivery of these Services. For the avoidance of doubt, the Contract Charges shall be inclusive of all third-party costs.
Insurance Requirements	**Insurance** (Clause 19 of the Contract Terms) Additional public liability insurance to cover all risks in the performance of the Contract, with a minimum limit of £5 million for each individual claim. Additional employers' liability insurance with a minimum limit of £5 million indemnity. Additional professional indemnity insurance adequate to cover all risks in the performance of the Contract with a minimum limit of indemnity of £2 million for each individual claim. Product liability insurance cover all risks in the provision of Deliverables under the Contract, with a minimum limit of £5 million for each individual claim.
Liability Requirements	**Suppliers limitation of Liability** (Clause 18.2 of the Contract Terms);
Customer billing address for invoicing:	All invoices should be sent to should be sent to [redacted] or Billingham (UKSBS, Queensway House, West Precinct, Billingham, TS23 2NF)
Special Conditions	There will be 1 optional break clause relating to the Optional extra of Architype panel costs. BEIS will decide whether to proceed with this additional requirement near or after the project's completion. A contract extension would be put in place if BEIS decides to proceed with this additional requirement.
GDPR	Please see Contract Terms Schedule 7 (Processing, Personal Data and Data Subjects).

FORMATION OF CONTRACT

BY SIGNING AND RETURNING THIS LETTER OF APPOINTMENT (which may be done by electronic means) the Supplier agrees to enter a Contract with the Customer to provide the Services in accordance with the terms of this letter and the Contract Terms.

The Parties hereby acknowledge and agree that they have read this letter and the Contract Terms.

The Parties hereby acknowledge and agree that this Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of this letter from the Supplier within two (2) Working Days from such receipt For and on behalf of the Supplier: For and on behalf of the Customer:

Name and Title: [redacted]

Name and Title: [redacted]

Signature: [redacted] Signature: [redacted]

Date: [redacted] Date: [redacted]

ANNEX A

Customer Project Specification

1. Background
Project Context In 2019, the UK Government set a legally binding target to achieve net zero greenhouse gas emissions across the UK economy by 2050. This made the UK the first major economy to legislate for a net zero target. The UK has already made progress towards this target, reducing emissions by 40% between 1990 and 2018. The UK continues to show international leadership on climate change, recently announcing the world's most ambitious legally binding target, to reduce greenhouse gas emissions by 78% by 2035.[1] This follows the Climate Change Committee's (CCC) sixth Carbon Budget advice and will ensure that Britain is on track to end its contribution to climate change by 2050, fulfilling commitments under the Paris Agreement.[2]

[1] Department for Business, Energy and Industrial Strategy (2021), UK enshrines new target in law to slash emissions by 78% by 2035: https://www.gov.uk/government/news/uk-enshrines-new-target-in-law-to-slash-emissions-by-78-by-2035

[2] Climate Change Committee (2020), Sixth Carbon Budget: https://www.theccc.org.uk/publication/sixth-carbonbudget/

Heat in buildings is responsible for over a fifth of UK greenhouse gas emissions.[3] Meeting our net zero target will require virtually all heat in buildings to be decarbonised, and heat in industry to be reduced to close to zero carbon emissions.

The way heating is supplied to over 28 million homes, businesses and industrial users will need to change. Over the next fifteen years, we will gradually move away from fossil fuel boilers towards lower carbon alternatives. [4]

Heat pumps will play a significant role. The Government's 10 Point Plan for a Green Industrial Revolution and December 2020 Energy White Paper set out our ambition to grow the clean heat market to 600,000 heat pump installations per year by 2028.[5] As well as cutting emissions, this sector also has opportunities to improve air quality, create jobs and support economic growth.

Understanding the existing heating workforce and their attitudes towards heat pumps

To deliver our 2028 target, we will need to significantly increase the number of trained heat pump installers. Some of these new installers will be new entrants to the sector, trained via apprenticeships and T-levels[5]. Bringing new installers into the industry is also an opportunity to

[3] Department for Business, Energy & Industrial Strategy (2021), Final UK greenhouse gas emissions national statistics 1990-2019, emissions categories included: 'Commercial and miscellaneous combustion and electricity', 'Public' and 'Residential' https://www.gov.uk/government/statistics/final-uk-greenhouse-gas-emissionsnational-statistics-1990-to-2019

[4] Department for Business, Energy and Industrial Strategy (2020), Energy white paper: Powering our net zero future: https://www.gov.uk/government/publications/energy-white-paper-powering-our-net-zero-future [5] HM Government (2020), The Ten Point Plan for a Green Industrial Revolution: https://www.gov.uk/government/publications/the-ten-point-plan-for-a-green-industrial-revolution

[5] https://www.gov.uk/government/publications/introduction-of-t-levels/introduction-of-t-levels

improve diversity within the installer workforce. However, the majority will be existing fossil fuel heating installers, who take on additional training so that they can also install heat pumps. Cooling installers with experience in air-conditioning or refrigeration may also identify opportunities to diversify into heating systems. As the heat pump sector expands, it will need to maintain high standards to give consumers confidence in this relatively unfamiliar technology.

Most heating installers already have many of the skills needed to install heat pumps and require only a few days of additional training to become fully qualified. Recent research commissioned by BEIS with heating installers who work in off gas grid properties, found that 50% of those surveyed who have not received heat pump training would consider upskilling, and found high levels of support among installers for potential policy interventions to promote heat pump training (e.g. low carbon training vouchers and mandatory low carbon training modules for future installers). This research also identified barriers to upskilling for heat pumps experienced by installers, including proximity to retirement, cost and time involved to train, a lack of confidence in the future demand for heat pumps and negative past experiences with training providers.[6]

The transition to low carbon heating will also represent a major shift for the installer industry. Installers may also have concerns about the implications of the transition for their future job security or quality of work. In addition, business may have concerns about whether changes to their business models will be required as they expand to offer new technologies. Government is committed to ensuring a just and fair transition which provides appropriate support for both installers and businesses.

Scale and scope of the research

This research will develop our understanding of the existing heating and cooling installer workforce. It will also identify distinct archetypes within this workforce.

The findings of this research will be used to inform future Government policy on:

- Increasing the uptake and quality of training for current and future heat pump installers
- Removing barriers to diversity in the sector
- Ensuring all heat pumps are installed to a good quality
- Support for installers and businesses as they transition to installing low carbon heating, creating new green jobs and supporting the Government's levelling up agenda.

This project must provide 'best-in-class' evidence and analysis and is expected to be delivered through rigorously designed quantitative and qualitative methodologies, by organisations with significant expertise in these approaches. This is a high-profile and challenging project with opportunity to make significant impact supporting the growth and development of the clean heat market to 600,000 heat pump installations per year by 2028.

2. Aims and Objectives of the Project

[6] Department for Business, Energy and Industrial Strategy (2021), Social research with installers of heating systems in off gas grid areas of England and Wales: https://www.gov.uk/government/publications/heating-systemsin-off-gas-grid-areas-installers-experiences-and-attitudes-towards-low-carbon-heating

Research Aims

This research aims to develop a comprehensive understanding of the characteristics, activities and attitudes of the existing heating and cooling installer workforce. It will also identify distinct archetypes within this workforce.

This information will be used to understand the appetite of installers to develop the capability to install heat pumps in future. This includes their attitudes to training and any challenges this could pose for their existing business model. The research will also consider installer attitudes towards standards and accreditation schemes.

The archetypes identified by this work will be used to ensure that any future policy interventions and communications can be targeted effectively to maximise impact.

The research objectives for this project are:

- To develop a comprehensive understanding of the characteristics and activities of the heating and cooling installer workforce.
- To segment the heating and cooling installer workforce into distinct archetypes which can be used to inform strategies to support and encourage installers through the low carbon heating transition.
- To understand the extent to which heating and cooling installers can be upskilled to work on heat pumps in the future.
- To explore heating and cooling installers' attitudes towards standards and accreditation for low carbon heating and identify what factors influence these views.
- To understand how installer business models may need to adapt in the future to effectively install heat pumps, and explore potential challenges arising from these changes.

These research objectives have been designed to address a number of key evidence gaps arising from the Government's commitment to rapidly increase heat pump deployment to 600,000 per year by 2028. Key policy areas that evidence generated from this project can have impact on include:

- How Government and/or industry can encourage uptake of apprenticeships or upskilling for heating installers.
- Whether/how to provide additional skills and employment support in specific regions of England.
- How Government and/or industry can remove barriers to diversity in the heating sector.
- Which installer standards to require or promote for heat pump installations, and other ways to ensure installations are of a consistently high quality.
- How to encourage installers to shift to low carbon heating, and support both installers and businesses through this transition as demand for fossil fuel heating systems decreases.
- Future schemes (subject to funding) including the Clean Heat Grant and Home Upgrade Grant.

Research Questions

This research will address five high-level research questions which are outlined below. Sub-questions are also included, providing an indication of areas for further focus:

1) What are the characteristics and activities of heating and cooling installers?

a. What are their demographics and backgrounds?
b. What skills, specialisms, experience, and qualifications do installers have?
c. How diverse is the workforce in terms of age, gender, race and disability? (And does this vary?)
d. What proportion of installers' activities is spent on heat pumps and other heating technologies? (Including how they split their time across installation and maintenance). How do they expect this to differ in 5 and 10 years' time and why?
e. How do the installer workforce split their work across different types of buildings (e.g. off gas grid, new build, domestic, non-domestic, listed, urban, rural, houses, flats)?
f. Where are installers located geographically? Do regional variations exist?

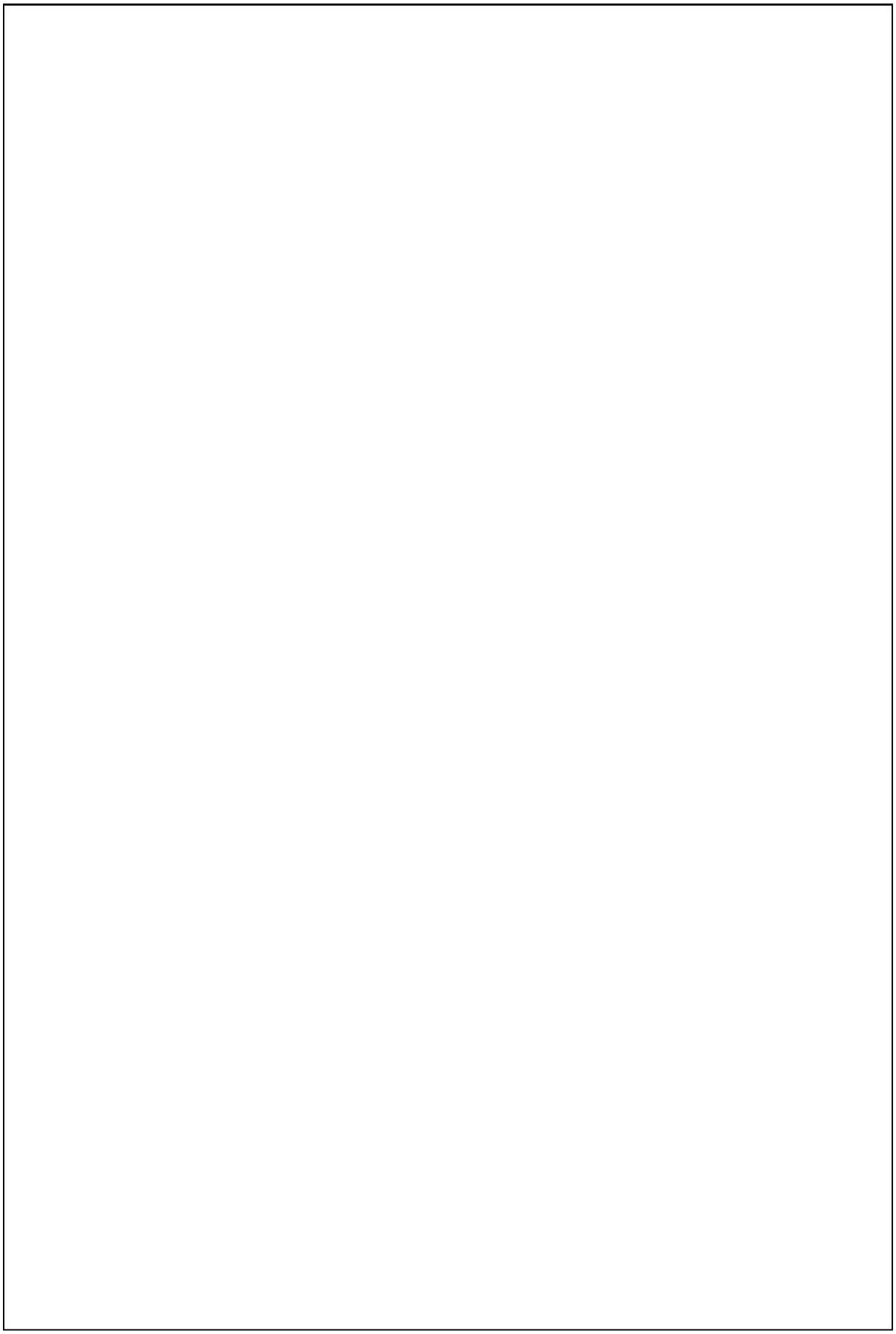
2) How can installers be categorised into distinct archetypes based on their willingness to install heat pumps, and upskilling required to do so?

a. How can an understanding of these distinct archetypes be used to target engagement and support for installers through the low carbon transition?
b. What factors could encourage these groups to upskill, install more heat pumps or take on heat pump apprentices?
c. Do any groups consider themselves specialists, distinct from the wider sector?
d. What are the attitudes of these groups to diversity in the sector?
e. Which sources of information do installers trust or rely on (to shape their attitudes)?
f. How far would installers travel to undertake work? (i.e. What regional granularity should be considered when assessing skills needs for different groups.)
g. How can installers be encouraged to advise on and recommend heat pumps as appropriate to their customers?

3) To what extent can heating and cooling installers be upskilled to work on heat pumps?

a. How many are willing and able to be upskilled to work on heat pumps?
b. What factors influence willingness and suitability for upskilling for heat pumps?
c. What influences installers' attitudes towards training and apprenticeships?
d. What factors influence these archetypes' decisions to upskill or increase the number of heat pump installations? How far would they be willing to travel, pay or spend time doing so? How does this compare to other available options?
e. What are experiences of those who have undertaken specific training in heat pumps? How can these courses be improved? (cost, affordability, time, content)
f. Would installers prefer to specialise, or remain flexible across technologies? What factors influence this?
g. What factors influence their willingness to take on an apprentice, and who they take on (incl. diversity)?
h. How confident would an installer be explaining to a consumer how to choose the right electricity tariff for their heat pump or signposting them to someone who could? (Or explaining how to use a heat pump alongside other related technology such as solar panels, batteries or electric vehicle chargers?) What additional information or resources could be provided to support this?

4) What are heating and cooling installers' attitudes towards standards and accreditation for low carbon heating and what factors influence these views?



a. What accreditation bodies do installers belong to, why do they belong to these bodies and what are their experiences of accreditation? (e.g. Gas Safe, MCS, competent person schemes, consumer codes such as RECC and HIES, TrustMark)
b. What factors influence decisions to join/not join specific schemes?
c. Would they like these schemes to change, or be consolidated/replaced?
d. What perceptions do installers have of installation quality issues within these schemes? What steps can be taken to ensure high quality heat pump installations and good customer experiences?

5) How might installer business models need to change to effectively install heat pumps, and what challenges could this pose for installers?

a. What are the challenges faced by different types of installation businesses to install heat pumps?
b. What are the potential approaches, risks, opportunities and business planning considerations for transitioning to becoming a heat pump installation business over time?
c. Are they affiliated with a manufacturer or energy supplier? If not, other major factors in choosing which equipment to use?
d. Does the installer offer smart controls, radiators or other additional energy efficiency measures?
e. How do installers work alongside other professions? (e.g. retrofit advisors, builders, electricians, plumbers, renewables installers). Which of these are in-house and which are external? How do they expect this to change in future?
f. What are the main factors driving cost and time to install a heat pump? How could these be reduced?
g. What are the main sources of business? E.g. referrals, via manufacturer etc.
h. How far should we expect businesses to specialise in certain technologies?
i. How can businesses take steps to improve diversity within the sector?

3. Suggested Methodology

Sample Definitions:

The population of interest for this research is heating and cooling installers, who work in England. This includes installers of both wet heating systems and warm air systems, as well as air conditioning (A/C) and refrigeration installers. These groups cover those who already install heat pumps and those who have transferable skills to potentially install heat pumps in future. There may be some cross-over between these groups and this should be explored further through this research.

Further detail on the characteristics of heating and cooling installers within the scope of this project is provided below:

Heating Installers

- Currently work as a heating system installer of wet and/ or warm air systems
- Installs any type of heating system (i.e. any number of high carbon or low carbon systems)
- Installs heating systems in domestic and/or non-domestic buildings
- Installs heating systems in existing buildings (retrofit) and/or new builds.
- Works in England
- Note some may also install cooling systems.

Cooling Installers

- Currently works as an installer of cooling systems (i.e. refrigeration and/or A/C installer)
- Works in non-domestic and/ or domestic buildings • Works in existing buildings (retrofit) and/or new builds • Works in England.
- Note some may also install heating systems.

Methodology

Bidders should set out in detail their proposals for developing and delivering this research project alongside discussion of how their research design will answer the research questions.

We expect that the research questions will be answered through a mixed methods approach comprising both quantitative and qualitative primary research. This reflects the need for this research to provide robust population estimates of heating and cooling installers' characteristics and activities, as well as in-depth qualitative data around experiences and attitudes of installers and other stakeholders. Secondary research, including a literature review to synthesise the existing evidence relating to the research questions and/or the analysis of other data sources, is also expected to be undertaken to feed into the design and scope of the primary research and to triangulate findings. The literature review/ secondary analysis, quantitative survey, qualitative research and archetype development aspects of this project are core requirements, however it is made clear throughout where we welcome alternative approaches from bidders.

A summary of the proposed research activities are given below and they are discussed in detail throughout this section:

- Literature review and secondary analysis synthesising existing evidence and data sources on heating installer characteristics and future training requirements.
- Quantitative push-to-web survey/ telephone survey of installers (~2,500 respondents, representative sample). Random probability sample providing robust generalisable evidence to the installer workforce in England.
- Qualitative tele-depth interviews with installers (~50 installers)
- Stakeholder workshops (x3 session)
- Focus groups with installer archetypes (5-10 sessions)
- Archetype panel (additional extra outside of core budget)

Literature Review and Secondary Analysis

Bidders should set out in detail their approach to this phase.

- As a first stage of this project, a literature review should be undertaken to synthesise the existing evidence in relation to the research questions. This review will include a review of grey and academic literature. Bidders should detail examples of their proposed search terms and search strategies.
- This stage will also include a review of available secondary evidence sources relevant to the characteristics and activities of the heating installer market. This may include accessing high level data from competent person's schemes, to understand the characteristics of their membership. Bidders should outline their approach to the secondary data analysis, including example data sources they will use. Bidders should outline how they will work with BEIS and external groups to access the secondary data sources identified.

- Evidence from the literature review and secondary analysis will inform subsequent stages of the research, including development of data collection tools and can inform sample design.
- This phase of the research should be comprehensive and bidders are expected to commit sufficient resource to this phase of the project.

Quantitative Survey

Bidders should set out in detail their survey methodology, random probability sampling approach (including assurance of how representativeness will be achieved and how their design impacts effective sample sizes), approach to archetype identification and their survey analysis plan. More details of the requirements are given below.

- To date, no survey provides robust population-level estimates of the entire heating and cooling installer workforce's characteristics, activities, experiences, and attitudes in relation to the research questions. This data will be vital to support policymaking around the rapid increase in heat pump deployment.
- It is expected that this survey will collect data on the following areas: demographics and diversity, experience and training, business models, accreditation, specialisms (e.g. types of buildings and systems worked on), apprenticeships, future trends in the sector, awareness, impacts and attitudes towards the low carbon transition. Bidders should outline how they will work with BEIS to develop the questionnaire.
- Survey data must be used to segment the heating and cooling installer workforce into distinct archetypes. These archetypes are intended to be used to inform future strategies to support and encourage installers through the low carbon heating transition.
- The requirement of this survey to provide representative population-level estimates of the installer population, means that rigorous sample design will be vital. We expect a random probability sample approach will be essential to achieve this.
- Please note that we expect the unit of analysis for the survey sample to be individual installers. Bidders should outline how they will account for this in their approach and analysis. This may include consideration of probability proportional to size sampling approaches, weighting to account for unequal selection probabilities and practical considerations such as how individual installers will be contacted within businesses.
- Assuming a 95% confidence level, we expect ~2,500 survey responses will be required. Following recent BEIS research with heating system installers,[7] we anticipate a response rate of ~10% is achievable with the right approach supported by incentives. Therefore, we would expect a sample frame of ~25,000 businesses [8]
- It is expected incentives will be required. Given the number of survey respondents, it may not be feasible to provide meaningful incentives to all participants. Therefore, a competition or raffle may be suited in this instance. Incentives should be costed for within the total budget. Bidders should outline their cost-effective approach to incentives.
- The literature review and secondary data analysis undertaken prior to the survey should provide an indication of the high-level characteristics of the installer workforce (e.g. age,

[7] Department for Business, Energy and Industrial Strategy (2021), Social research with installers of heating systems in off gas grid areas of England and Wales: https://www.gov.uk/government/publications/heating-systemsin-off-gas-grid-areas-installers-experiences-and-attitudes-towards-low-carbon-heating

[8] Department for Business, Energy and Industrial Strategy (2021), Social research with installers of heating systems in off gas grid areas of England and Wales – Annex B: https://www.gov.uk/government/publications/heating-systems-in-off-gas-grid-areas-installers-experiences-and-attitudes-towards-low-carbon-heating

location, system types installed); this can be used as a benchmark for assessing the representativeness of the survey sample, developing survey weights, and should be used to analyse whether non-response bias is present.

- Potential survey modes likely to be effective include push-to-web and/or telephone. A blended approach may be beneficial. For example, using push-to-web as the primary mode and chasing up non-respondents by telephone who can complete via the phone if desired. We welcome bidders' suggestions for the most effective survey mode. The proposed approach should be clearly justified, with considerations of strengths and weaknesses.
- Installer surveys should take no longer than 20 minutes to complete.
- We would expect that questionnaires are cognitively tested and piloted.
- To support the development of archetypes, more complex statistical analysis beyond descriptive statistics is required. For example, this may include cluster analysis, latent class analysis, or regression modelling. Bidders should outline the rigorous methodology they will use to identify installer archetypes.
- To explore differences across different installer groups/archetypes, cross-tabulations, descriptive statistics and significance testing is expected at a minimum.

An example approach to developing a sample frame that we have considered feasible would involve building a sample of businesses using SIC codes and is outlined below (note: we welcome alternative approaches, but it should not be assumed that registers such as Gas Safe can be accessed for sampling purposes):

- A similar approach has been used to develop a sample frame for installers in other BEIS projects. For example, the 'Social research with installers of heating systems in off gas grid areas of England and Wales' project built a sample of installers to survey using the following SIC codes: "Central Heating – Installation and Servicing", "Gas Engineers" and "Heating Contractors and Consultants" [9].
- This SIC code list could be adapted in line with the population of interest for this survey.
- Once the sample frame has been developed, businesses should be randomly contacted either by telephone or post, depending on the survey mode adopted
- It may be beneficial to stratify the sample into characteristics such as region, business size and type of heating system installed / SIC code type, weighted in line with the population distribution on these characteristics. The literature review/ secondary analysis stage at the start of the project can inform this. However, this will only be possible if sufficient information on the installation business population is available. If not, businesses should be selected via a simple random sample approach.

Qualitative Research

Bidders should outline in detail their approach to the qualitative phase of this project, with a focus on how their selected methods will contribute to achieving the project's objectives. Please also outline how incentives may be used to promote participation.

[9] Department for Business, Energy and Industrial Strategy (2021), Social research with installers of heating systems in off gas grid areas of England and Wales: https://www.gov.uk/government/publications/heating-systemsin-off-gas-grid-areas-installers-experiences-and-attitudes-towards-low-carbon-heating

Qualitative research methods will be vital to provide the depth and detail required to sufficiently address this project's research questions. The qualitative research required is expected to:

- Expand upon and triangulate survey findings relating to the characteristics, activities, attitudes and experiences of heating and cooling installers.
- Support the development and refinement of installer archetypes.
- Gather insights from expert informants/ stakeholders such as industry leaders, academics and trade-bodies, to develop policy options that can support the future low carbon heating sector and the transition for the high carbon sector.
- Test policy proposals and potential challenges for heat transition with archetypes.

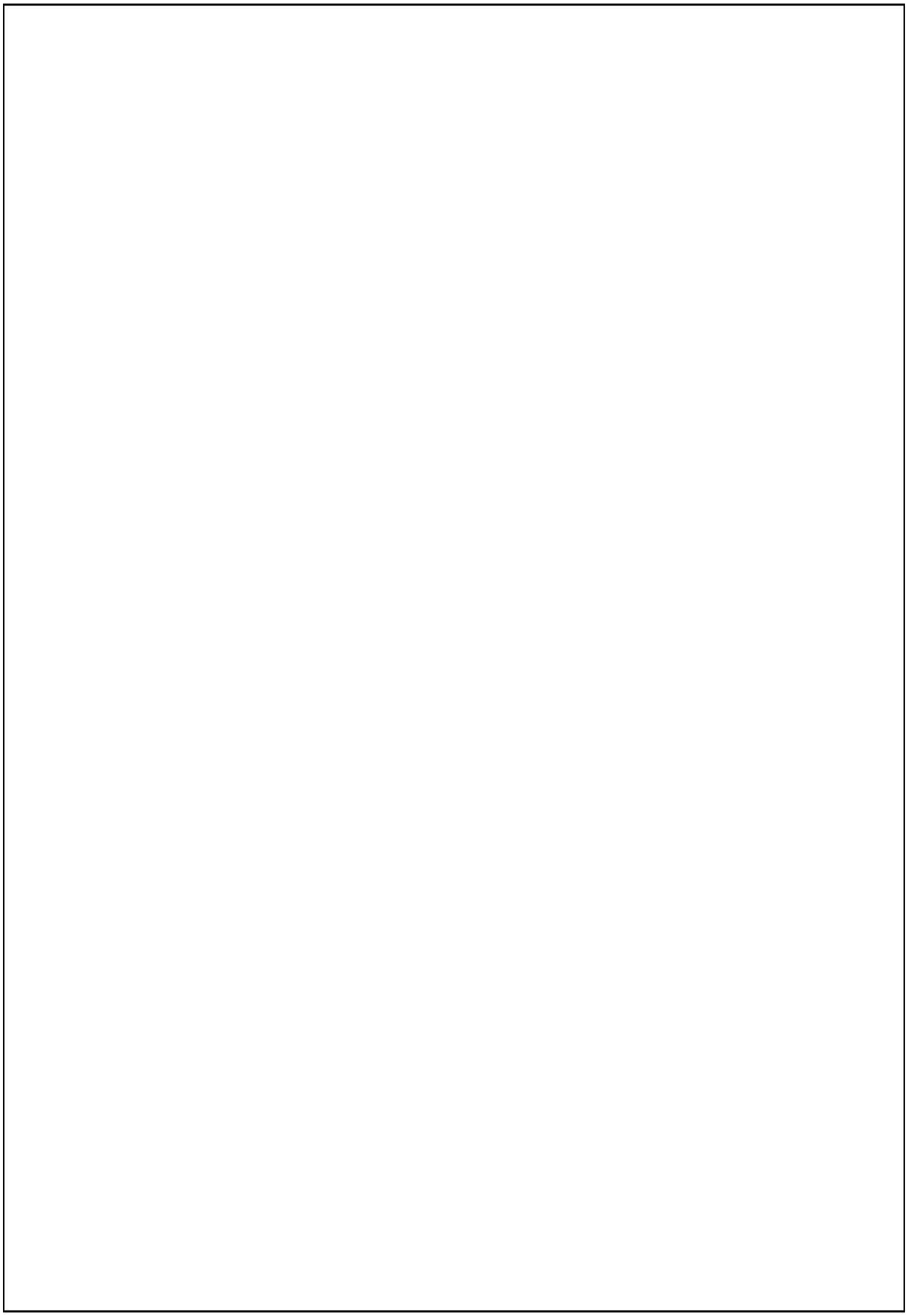
An outline of how qualitative research may be used to fulfil this project's objectives is outlined below.

1) Tele-depth interviews with heating and cooling installers:

- These interviews are expected to take place after initial analysis of the quantitative survey has been completed and initial installer archetypes have been developed.
- ~50 tele-depth interviews lasting 45-60 minutes will be undertaken.
- Installers will be purposively sampled based upon the installer archetype group they belong to. It is not possible to pre-empt the number of archetypes that will be identified, but it is expected to be between 5 and 10. A minimum of 5 interviews per installer archetype group should be undertaken; within archetype groups, interviewees should have a diversity of characteristics (e.g. age, region and gender) to ensure a range of perspectives are captured.
- It will be important to conduct interviews with members across all archetypes, but it may be beneficial to use more interviews with archetypes that are expected to be most able to upskill for heat pumps in the future and those who install heat pumps already.
- Participants will be recruited from those who completed the survey. Consent will be taken during the survey to enable permission for the researchers to re-contact them for future research.
- Interviews are likely to cover more detail around the activities of installers and the outstanding attitudinal and experiential questions best explored with qualitative data, relating to key topics like training, upskilling, accreditation, motivational factors, the future of the market, policy interventions and installer archetypes.
- Incentives will be required to promote participation.
- Interviews should be recorded and transcribed with consent of participants.
- Interview data will be analysed, likely using thematic analysis.

2) Stakeholder workshops

- Up to three virtual workshops with BEIS, industry experts and stakeholders will be held with the aim of gathering feedback to refine installer archetypes and to promote discussion and idea generation particularly around research questions 2, 2a and 5:
    - RQ2 - How can installers be categorised into distinct archetypes based on their willingness to install heat pumps, and upskilling required to do so? ○ RQ2a – How can understanding of these distinct archetypes be used to target engagement and support for installers through the low carbon transition?
    - RQ5 – How might installer business models need to change to effectively install heat pumps, and what challenges could this pose for installers?



- As a result of the workshop(s), it is expected that archetypes will be refined further and that a range of policy recommendations feeding into these research questions can be developed by the contractors.
- It may be beneficial to have a subsequent workshop/ presentation with stakeholders to present the updated archetypes and initial policy recommendations. The groups can then provide further feedback to support the further refinement of archetypes and policy implications which will go into the final report and will be tested in subsequent installer focus groups.

3) Focus groups with installer archetypes (5-10 focus groups)

- At least one focus group with each installer archetype will be held (5-10 focus groups). It may be considered unnecessary to run focus groups with an archetype(s) of installers that are not expected to be targeted for upskilling for heat pumps.
- To ensure an appropriate range of installers from each archetype can attend these focus groups, we expect these will be held virtually. However, bidders are welcome to suggest alternative approaches.
- The primary aim of the focus groups will be to test and gather feedback on the archetype specific policy ideas/ strategies to promote and support installers through the low carbon heating transition.
- The focus groups will also be a forum to further explore attitudes towards training, accreditation, ways of working, potential future business models and future challenges, which may not have been fully covered in the prior data collection.
- Installers will be recruited from those who completed the survey.
- Findings from the focus group will fill final gaps in research questions, support final refinement of archetypes and will support refinement of archetype specific policy recommendations and considerations for the future installer market.
- Incentives will be required to promote participation.

Archetype panel

Bidders should provide separate costings for the proposed panel, outline their approach to developing the panel alongside options and examples of how the panel could be used.

It may be beneficial to retain a diverse, representative panel of installers across each archetype who can be consulted for future research and policy questions. For example, future policy ideas and challenges could be tested through interviews or focus groups with panel members. The panel could also be used for longitudinal studies, for example to repeat survey questions and explore changes to installers' attitudes and experiences over-time. Once all core research activities have been completed, BEIS will make a decision on whether to maintain this panel on an ongoing basis.

Potential panel members should be recruited through the survey, where they will be asked to provide consent to be recontacted by the contractors/ BEIS for future research. If the panel is maintained, we will do so for at least one year, with the potential to review on a yearly basis.

Please note that this is an optional extra outside of the core budget. The cost of this requirement will depend on the research activity that is undertaken with the panel, so bidders should provide prices for different options/ types of research activities (e.g. cost of interviews, focus groups, surveys are likely to differ), up to the value of an £60,000 (exc. VAT) per year.

BEIS will decide whether to proceed with this additional requirement near or after the project's completion. A contract extension would be put in place if BEIS decides to proceed with this additional requirement.

4. Deliverables

The project deliverables required by BEIS are outlined below:

- **Literature review/secondary analysis outputs** - Interim findings slides and/or short interim report. The literature review and secondary analysis should be incorporated into the final project report (for example having its own chapter).
- **Quantitative survey outputs:** questionnaire, analysis plan, publishable survey data tables, publishable raw survey data, interim findings slides and/or short interim report.
- **Qualitative research outputs**: topic guides, workshop materials, qualitative analysis plan (including tools such as codebooks), interim findings slides and/or short interim report
- **Installer archetypes**: repeatable methodology for identifying installer archetypes.
- **Final written report** bringing together findings across all phases of data collection. This report should clearly address the research questions and objectives; the steering group will be consulted on the report structure and sign-off the final output. Note that a separate technical report and/or technical annex will be required. Annex 1 outlines report writing guidance.
- **Discussion workshop/meeting with policy stakeholders and steering group** at the end of the project to discuss the contractor's policy recommendations and how the research findings could be implemented.
- **Final presentation of results:** presentation of slides outlining findings from the final report.
- **Diagrams and visual representations** that can condense complex ideas and research findings accessibly should also be considered for inclusion in the interim and final outputs.

Timings

It is essential that the project (excluding the archetype panel) is completed by 28th February 2022. Bidders should outline a clear timetable and approach to delivering this research within the project timelines. Contractors will need to demonstrate sufficient resource to set-up quickly due to tight timelines.

Working Arrangements / Emerging Findings

It is important that BEIS are kept informed of emerging findings and project progress.

The successful contractor will be expected to identify one named point of contact through whom all enquiries can be filtered. A BEIS project manager will be assigned to the project and will be the central point of contact.

Weekly progress updates with the BEIS project manager will be required throughout the project and will take place via MS Teams and e-mail. These calls may be used to work with stakeholders to develop data collection tools during set-up of the project. During fieldwork this should include reporting on recruitment, response rate, risks etc.

A stakeholder steering group will be set-up and contractors may be expected to attend to discuss project progress, upcoming milestones and emerging findings.

All research tools, analysis plans and sampling methodologies will need to be agreed by BEIS.

BEIS will own the intellectual property rights of any and all intermediate products, including the final deliverables, and in particular including presentation slide packs, reports and data. **Interim reporting and presentations**

Bidders should outline their proposed approach to reporting and disseminating results.

After each wave of data collection, contractors will be expected to provide a presentation of the results, which may also be supplemented by a short-written report.

Contractors will also be expected to provide a presentation at the close of the project on the final report.

Contractors should expect to produce a number of drafts before outputs are signed-off.

Presentations are likely to take place online via MS Teams, however depending upon social distancing requirements at the time, this may change. **Reports**

At the end of the project (after the final presentation) we require a finalised, fully quality assured report. The report must be written in plain English. From experience we expect that a minimum of 3 drafts will be needed to reach the finalised report and these drafts should be delivered well in advance with sufficient time built in for review and comments. Each draft must be proof-read and delivered at a professional and publishable standard. Clear, precise and succinct language is essential. We expect this to be costed and accounted for in the timeline.

Contractors should consult the BEIS project management team and steering group to inform report structures and to provide sign-offs.

Peer Review

BEIS may wish to appoint an external peer reviewer for the project. If we do this then we will endeavour (though cannot guarantee) to align timings of this of this with the first set of comments from BEIS on the first draft of the report. **Publication**

The final report for this research project must be formatted according to BEIS publication guidelines, using the Research paper series template and adhering to BEIS accessibility requirements for all publications on GOV.UK. The publication template will be provided by the project manager. Please ensure you note the following in terms of accessibility: **Checklist for Word accessibility**

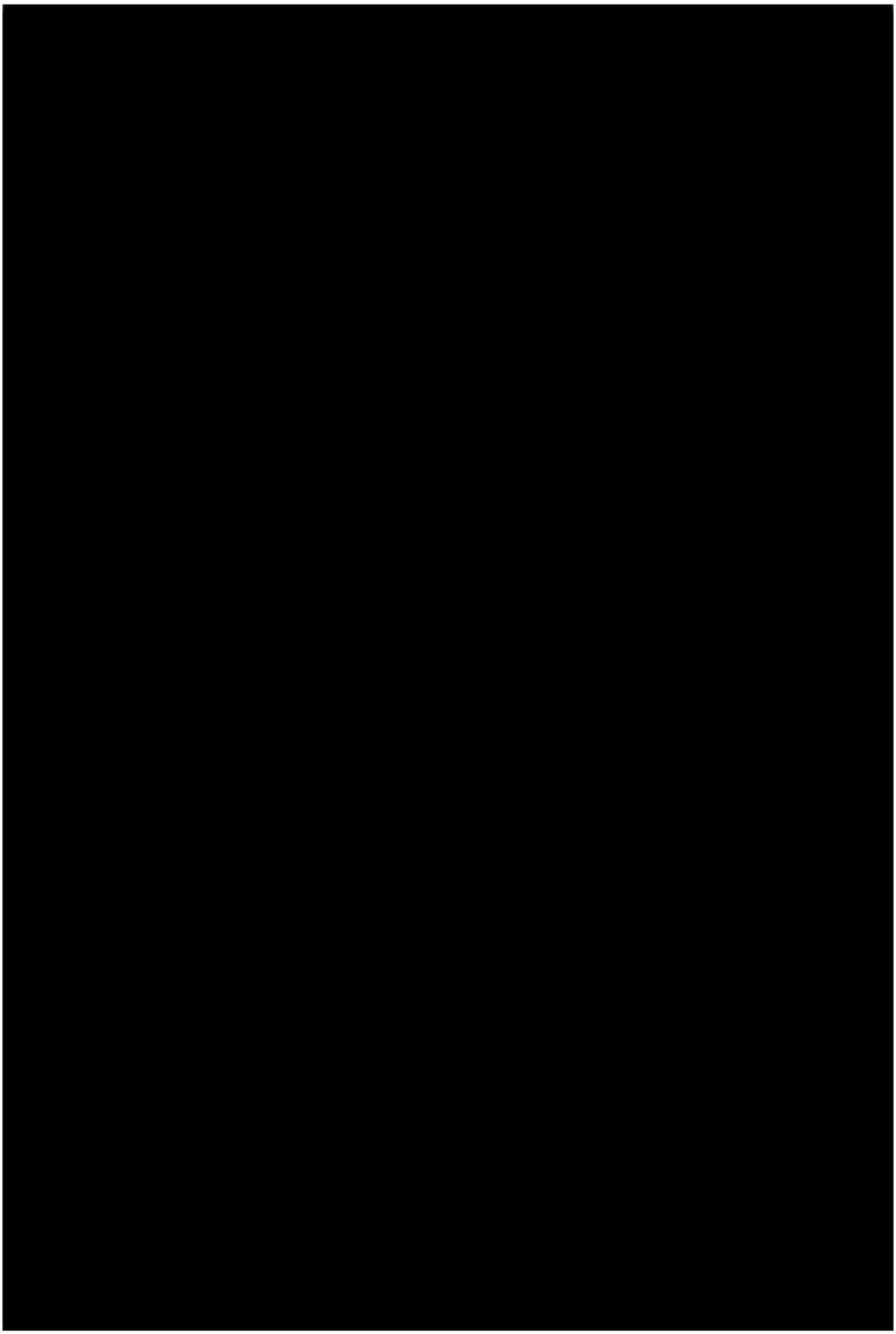
Word documents supplied to BEIS will be assessed for accessibility upon receipt. Documents which do not meet one or more of the following checkpoints will be returned to you for re-working at your own cost:

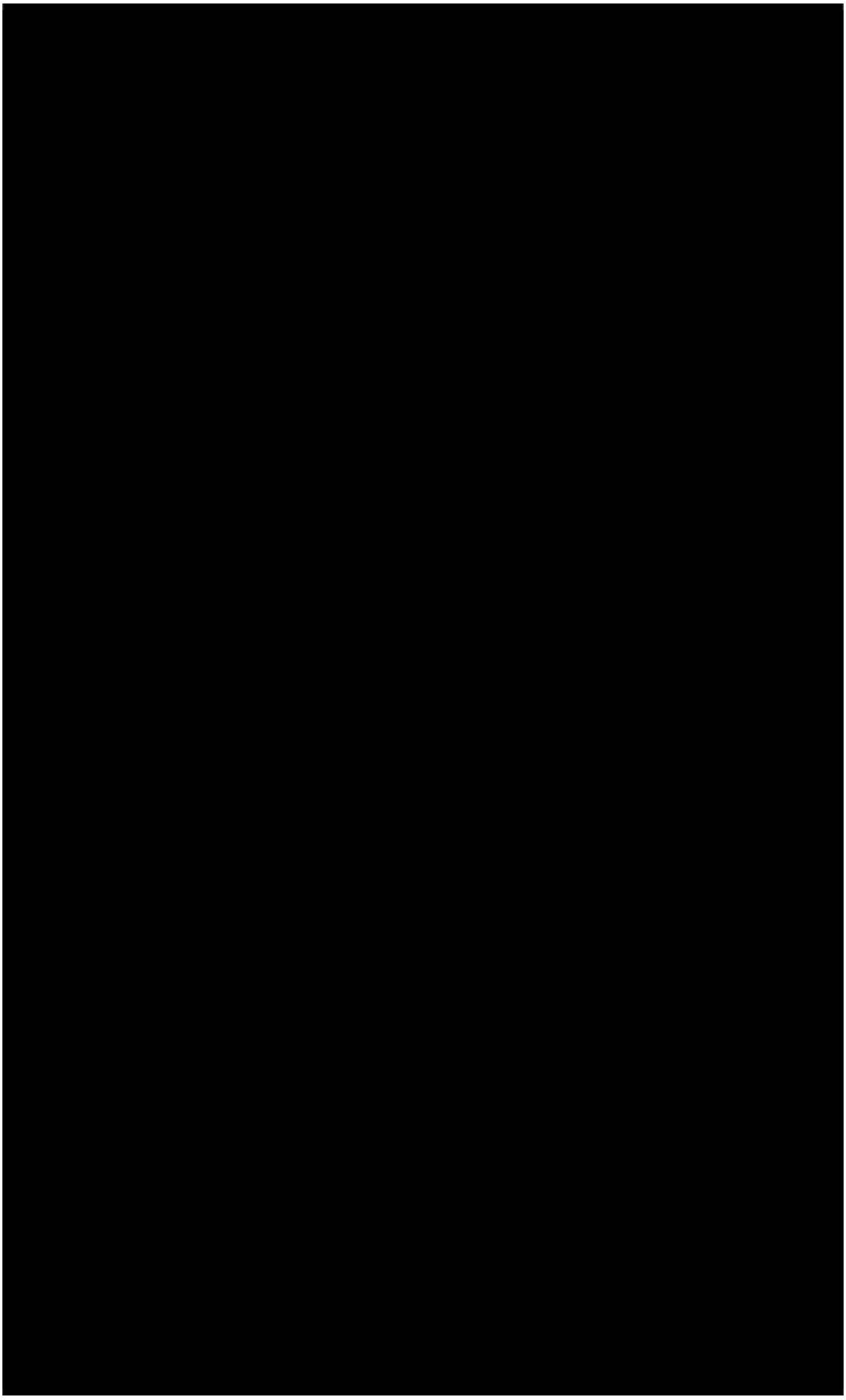
- document reads logically when reflowed or rendered by text-to-speech software
- language is set to English (in File > Properties > Advanced)
- structural elements of document are properly tagged (headings, titles, lists etc.)
- all images/figures have either alternative text or an appropriate caption
- tables are correctly tagged to represent the table structure
- text is left aligned, not justified
- document avoids excessive use of capitalised, underlined or italicised text
- hyperlinks are spelt out (e.g. in a footnote or endnote)
- Please see Annex A for BEIS Social Research Report Writing Guidelines.

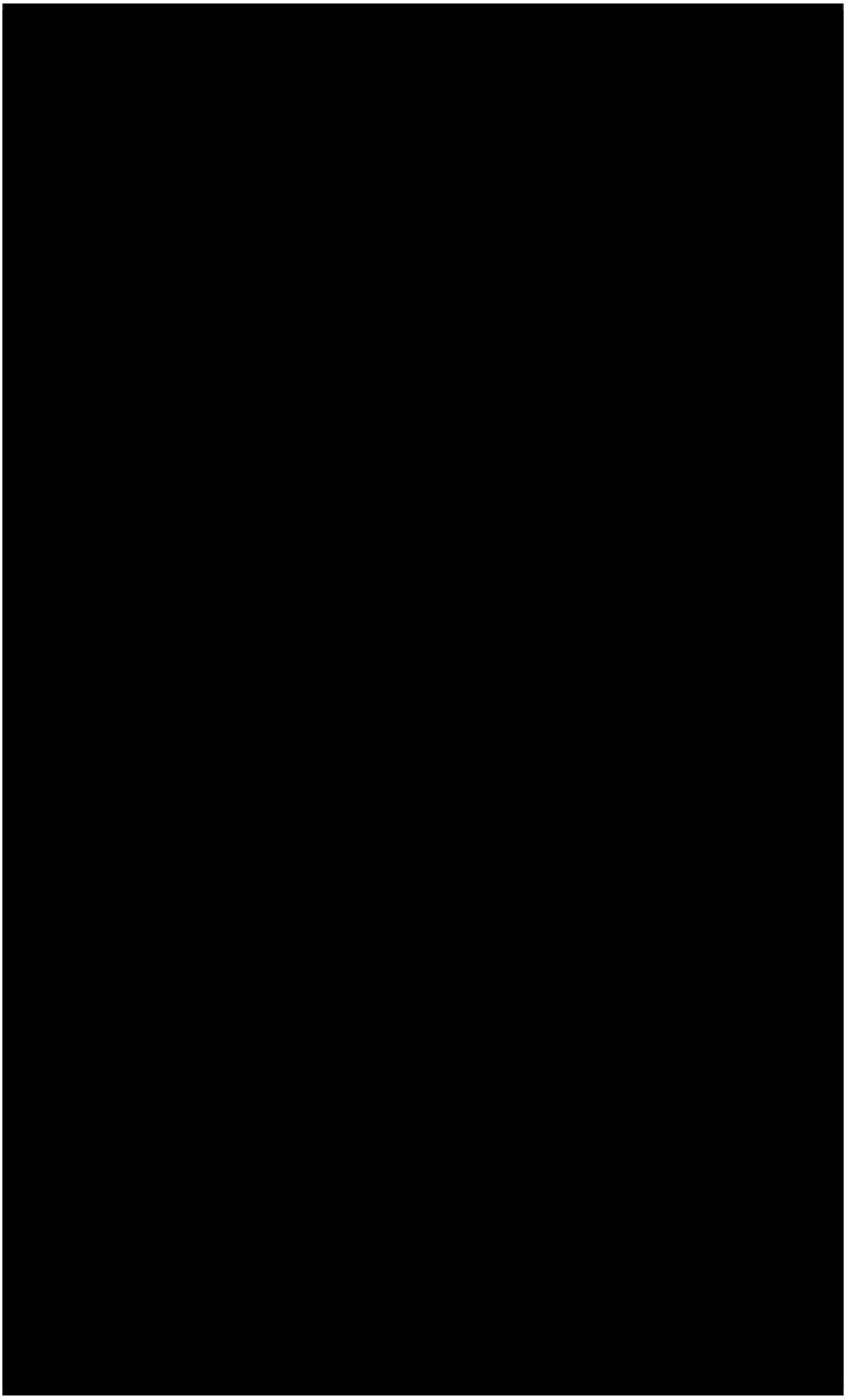
The price schedule allows for bidders to provide separate costs for the installer archetype panel. BEIS will only pay for the work completed.

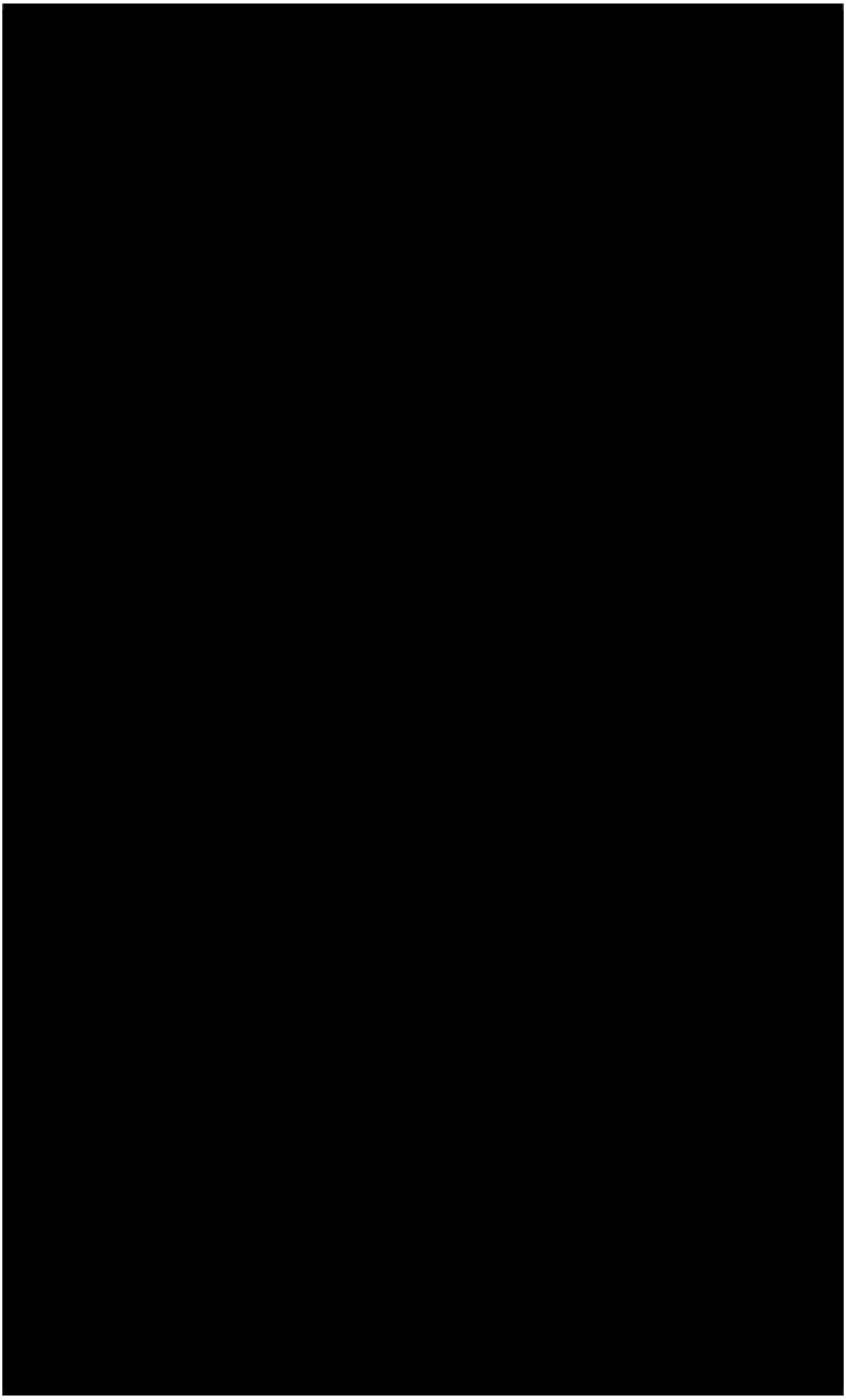
ANNEX B

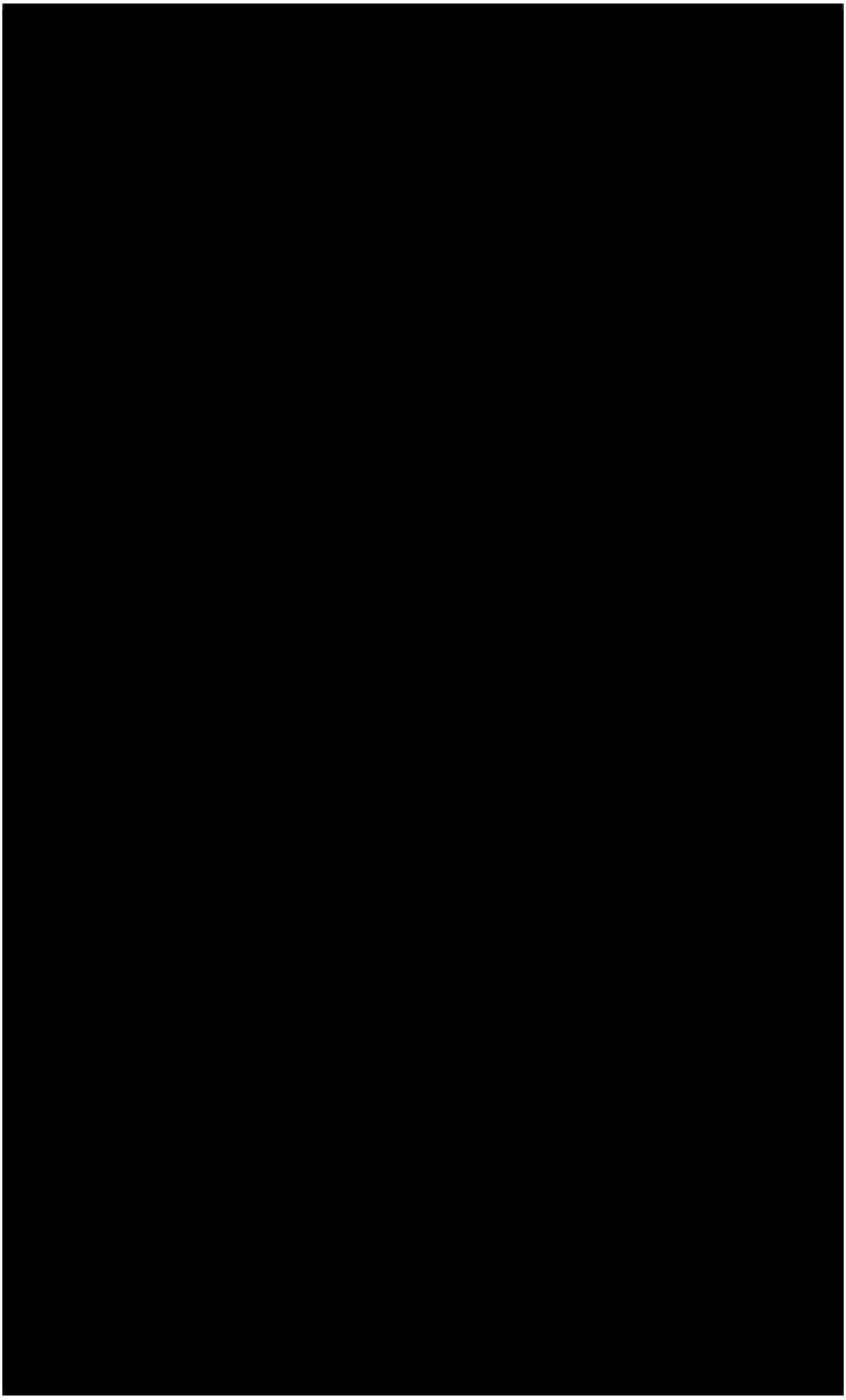
Supplier Proposal

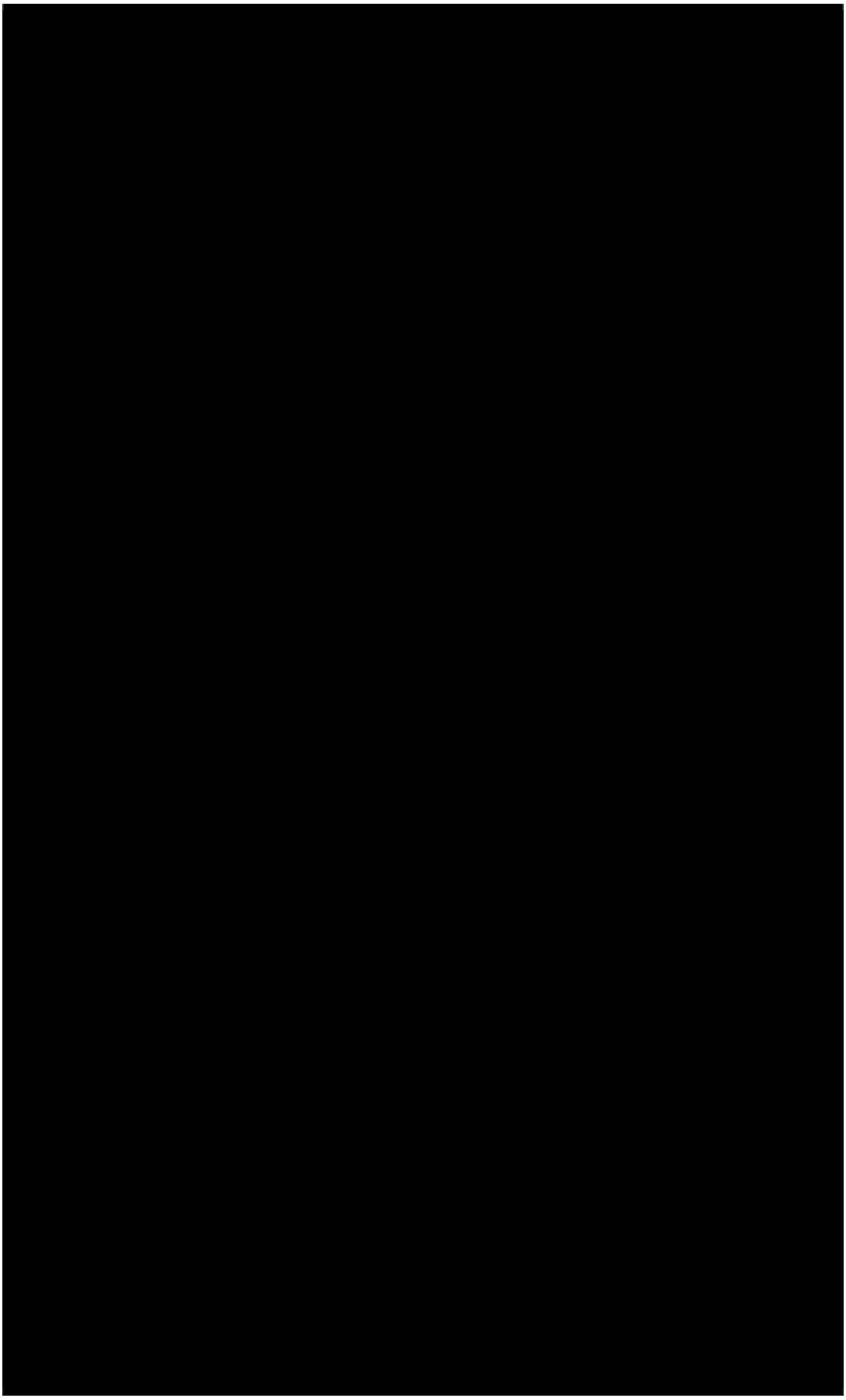


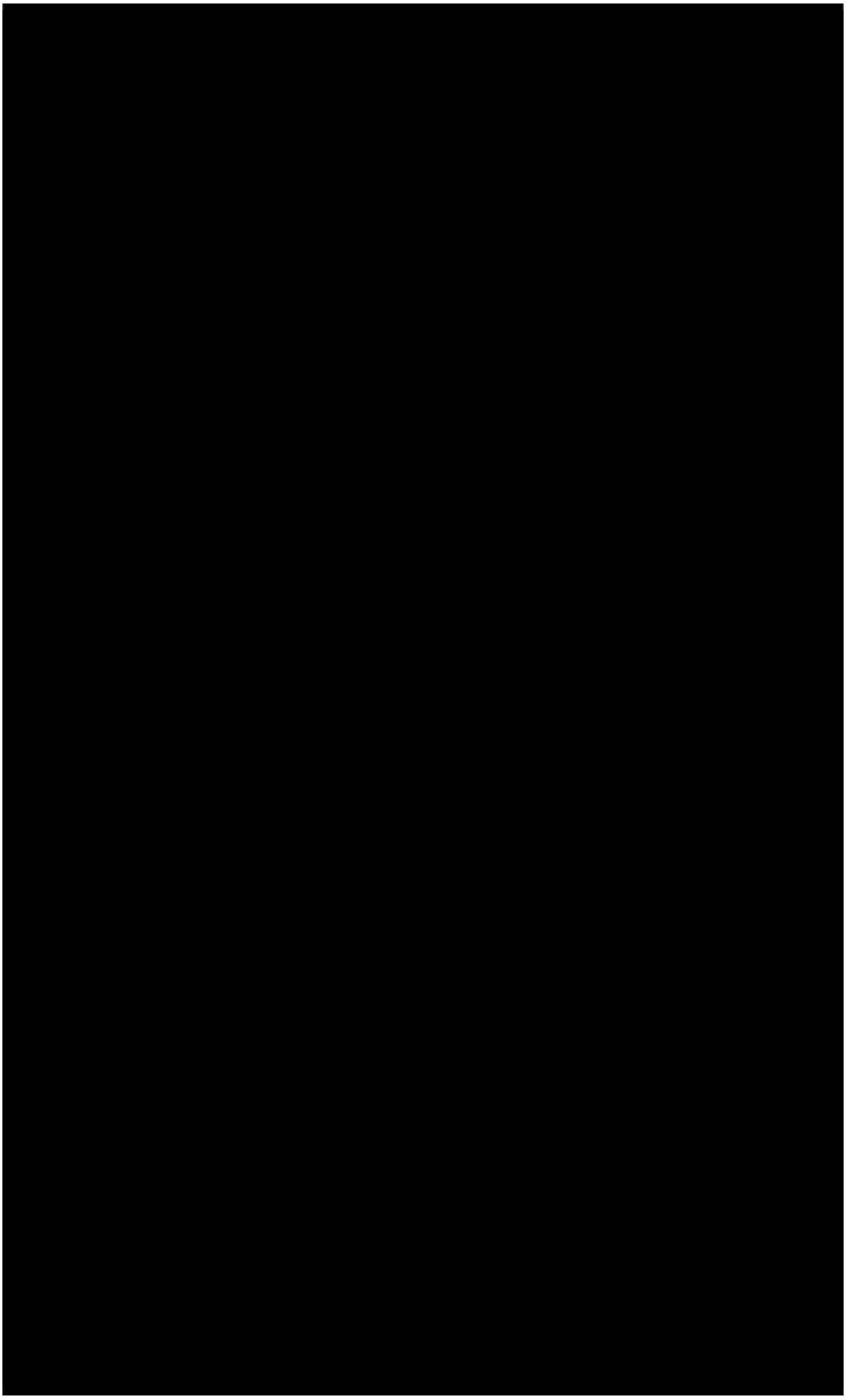


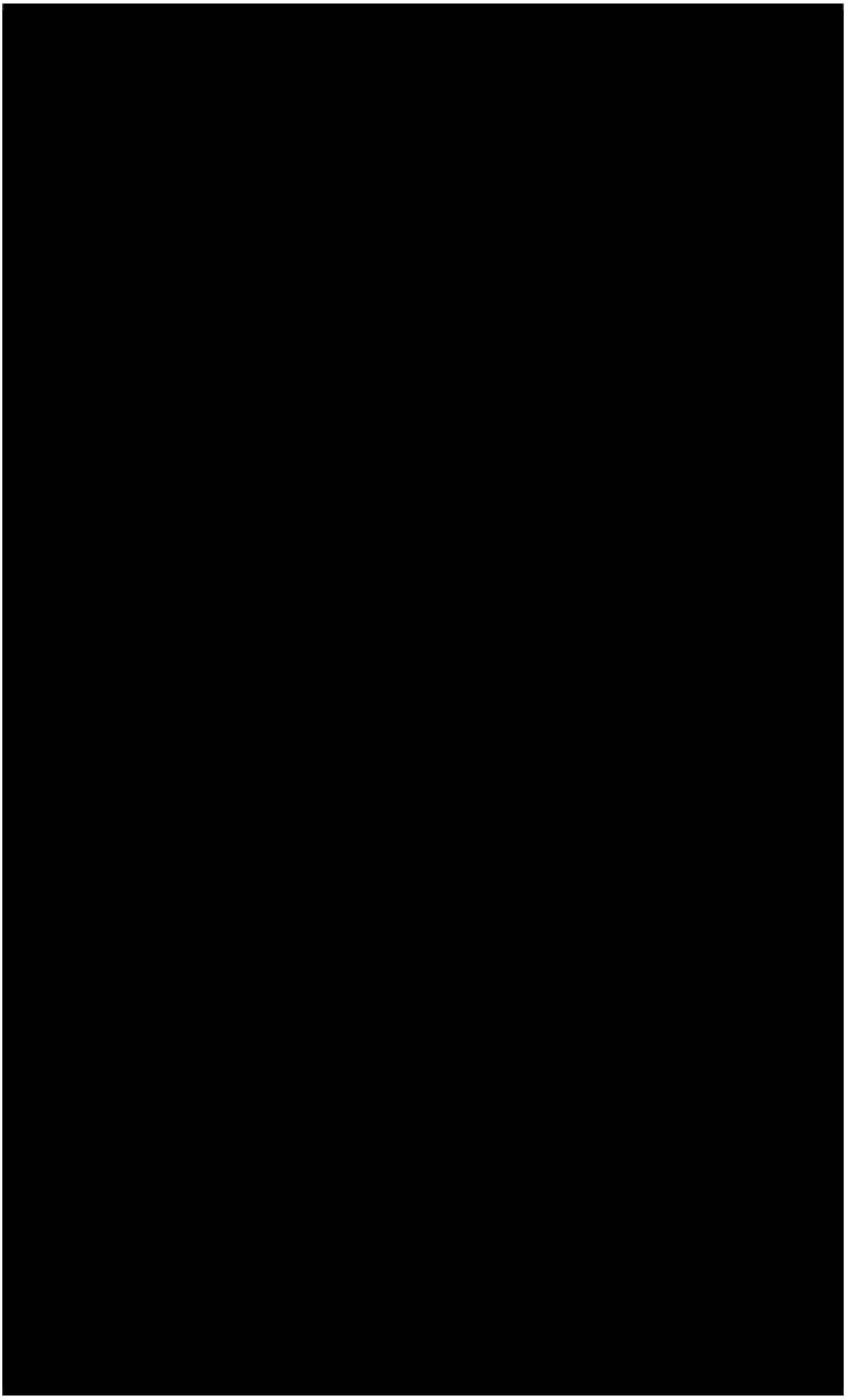


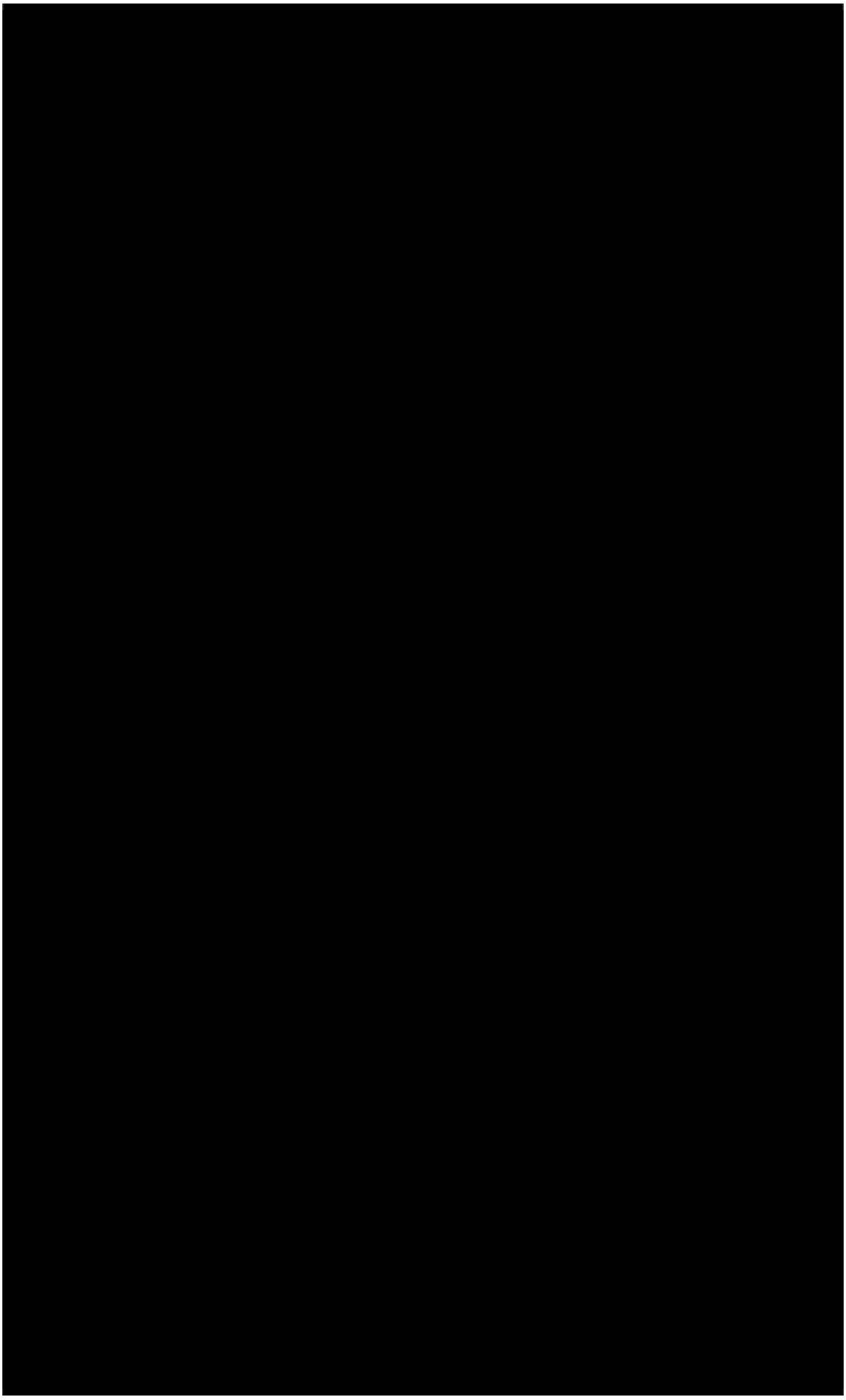


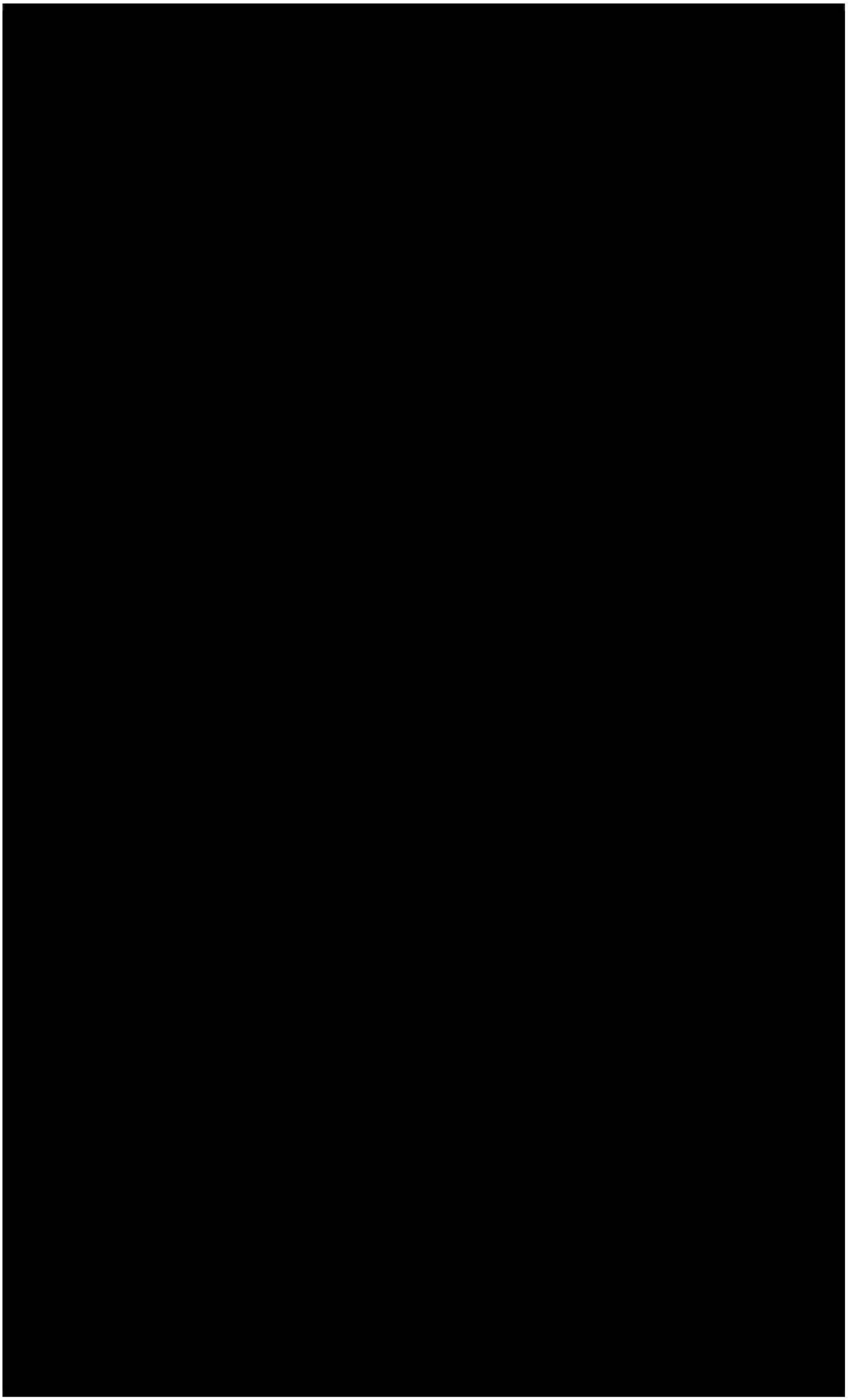


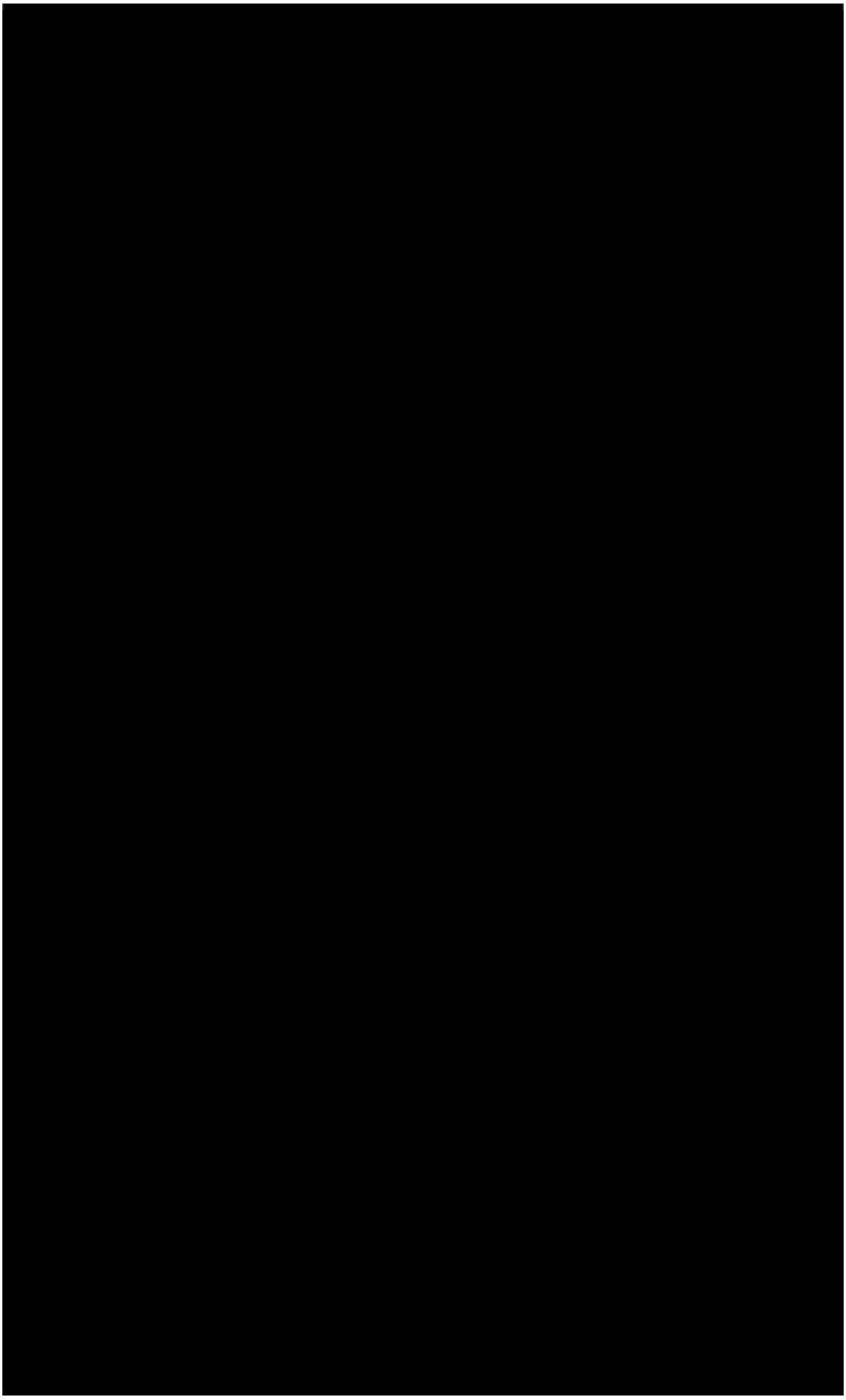


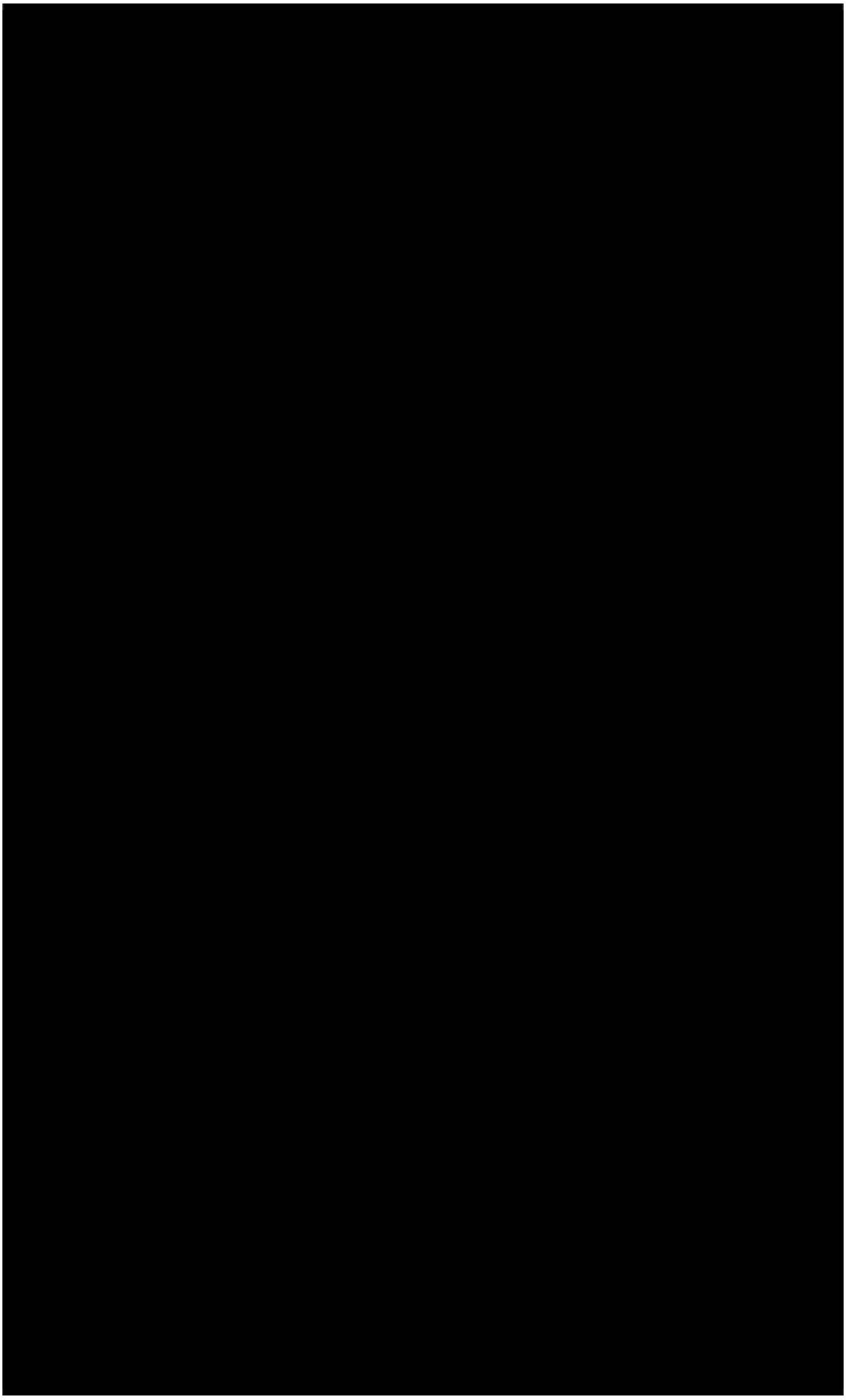


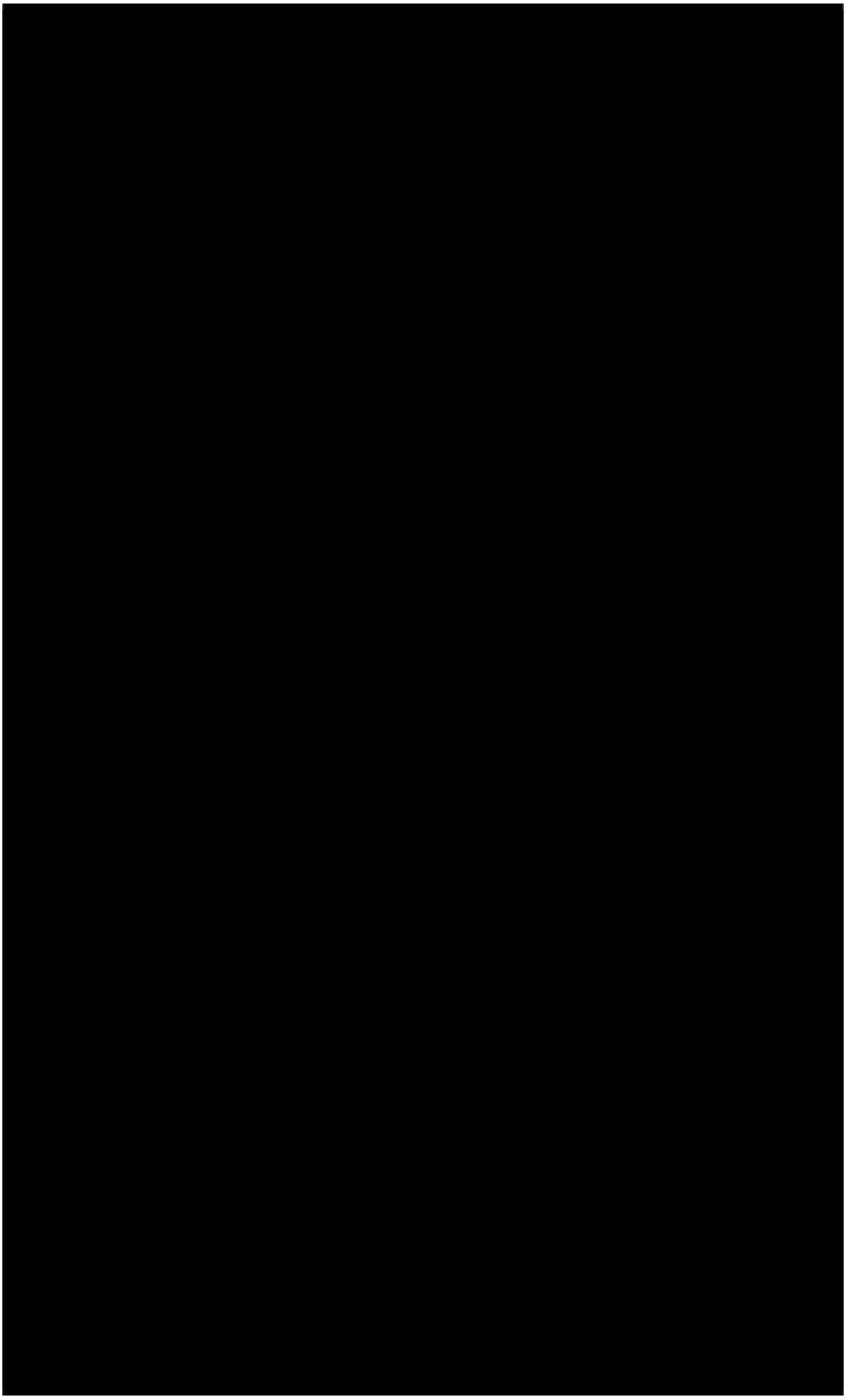


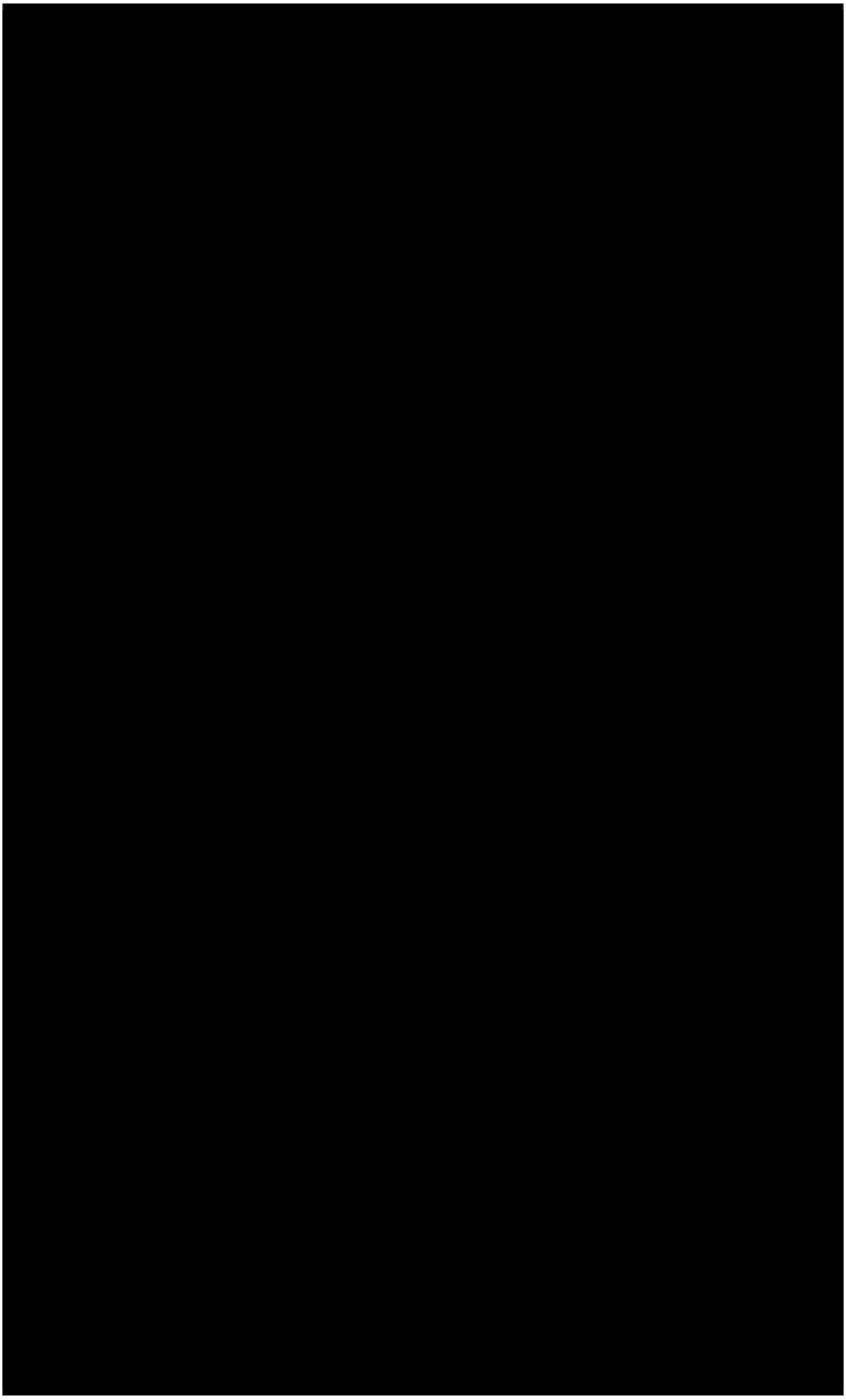


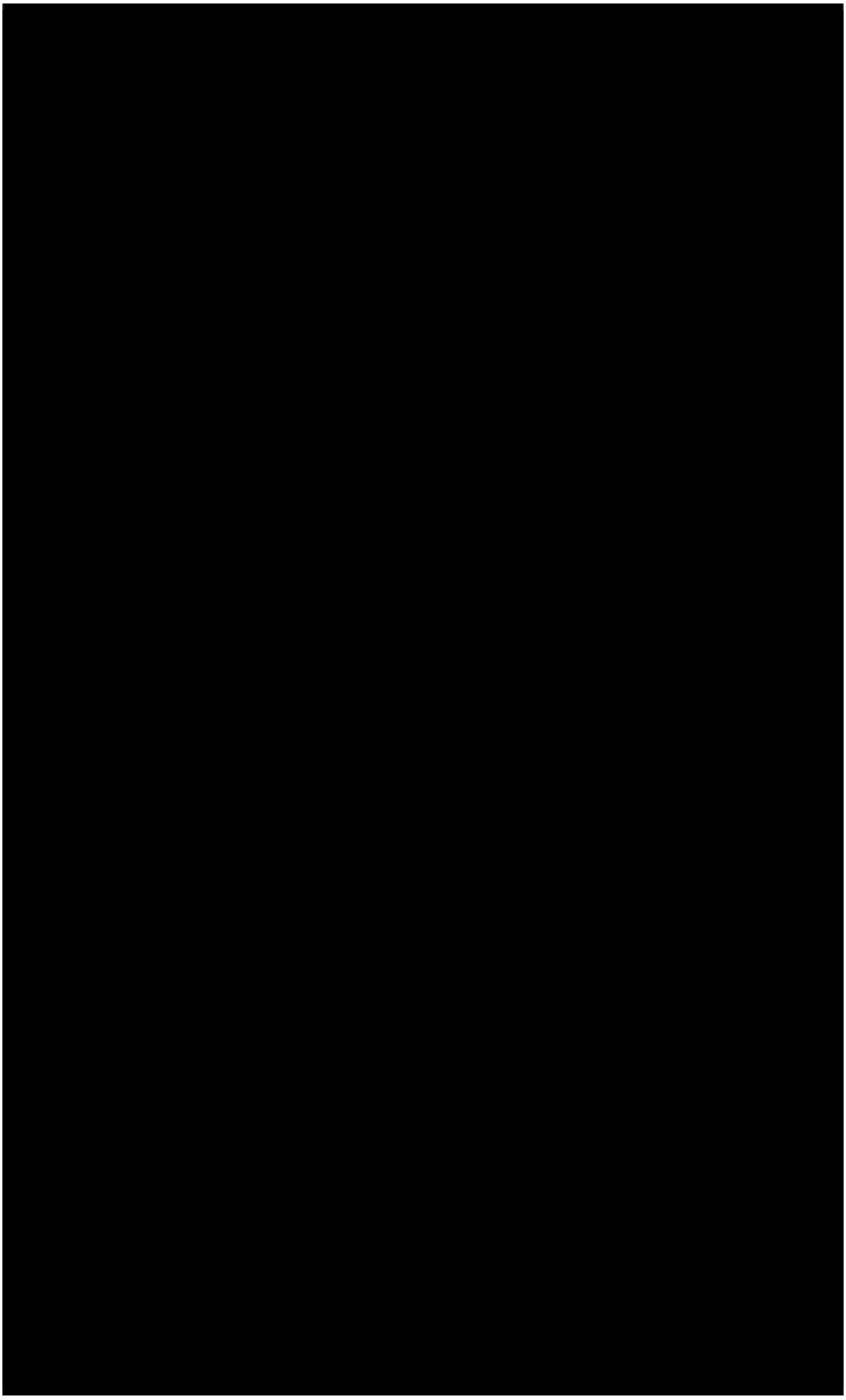


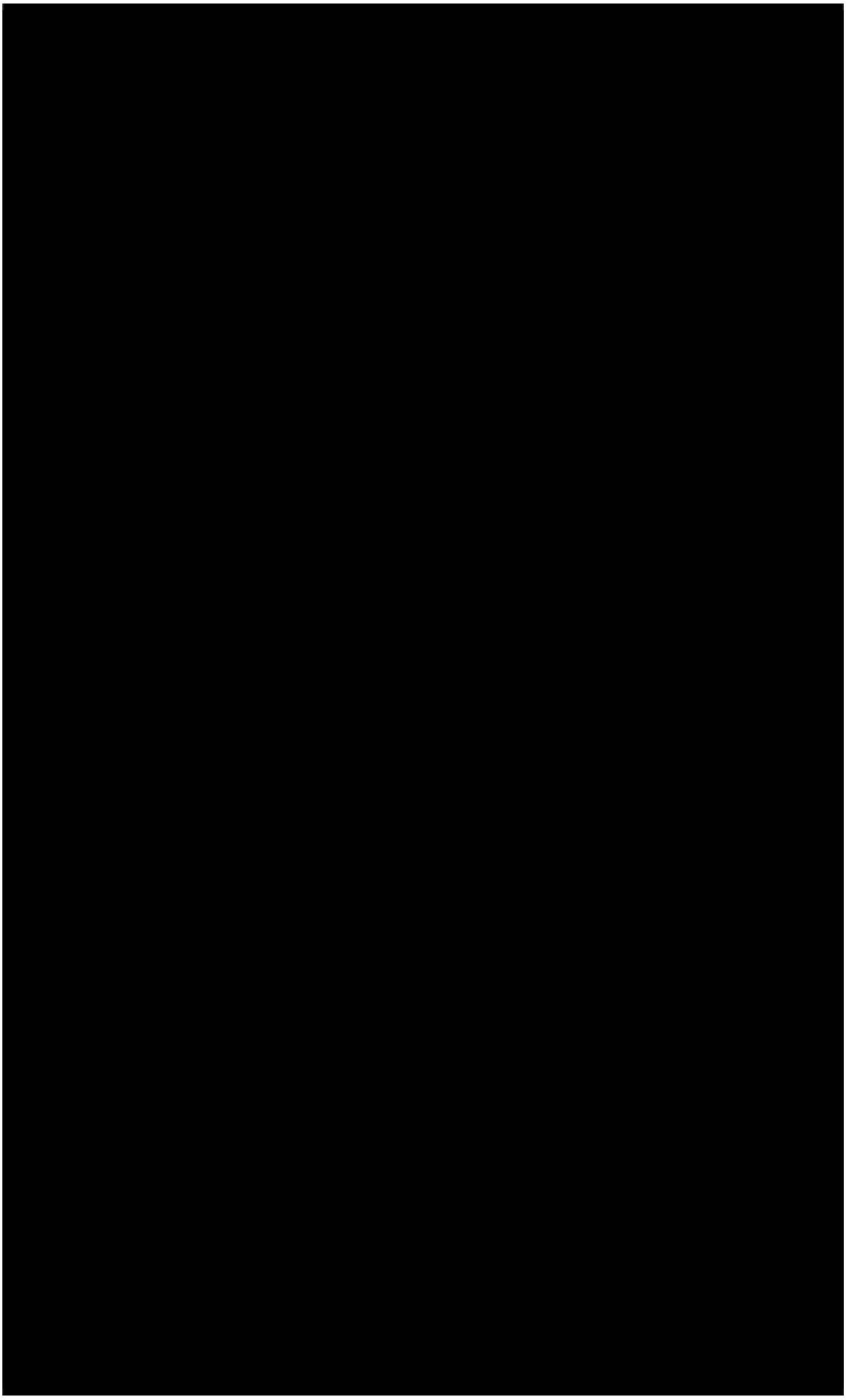


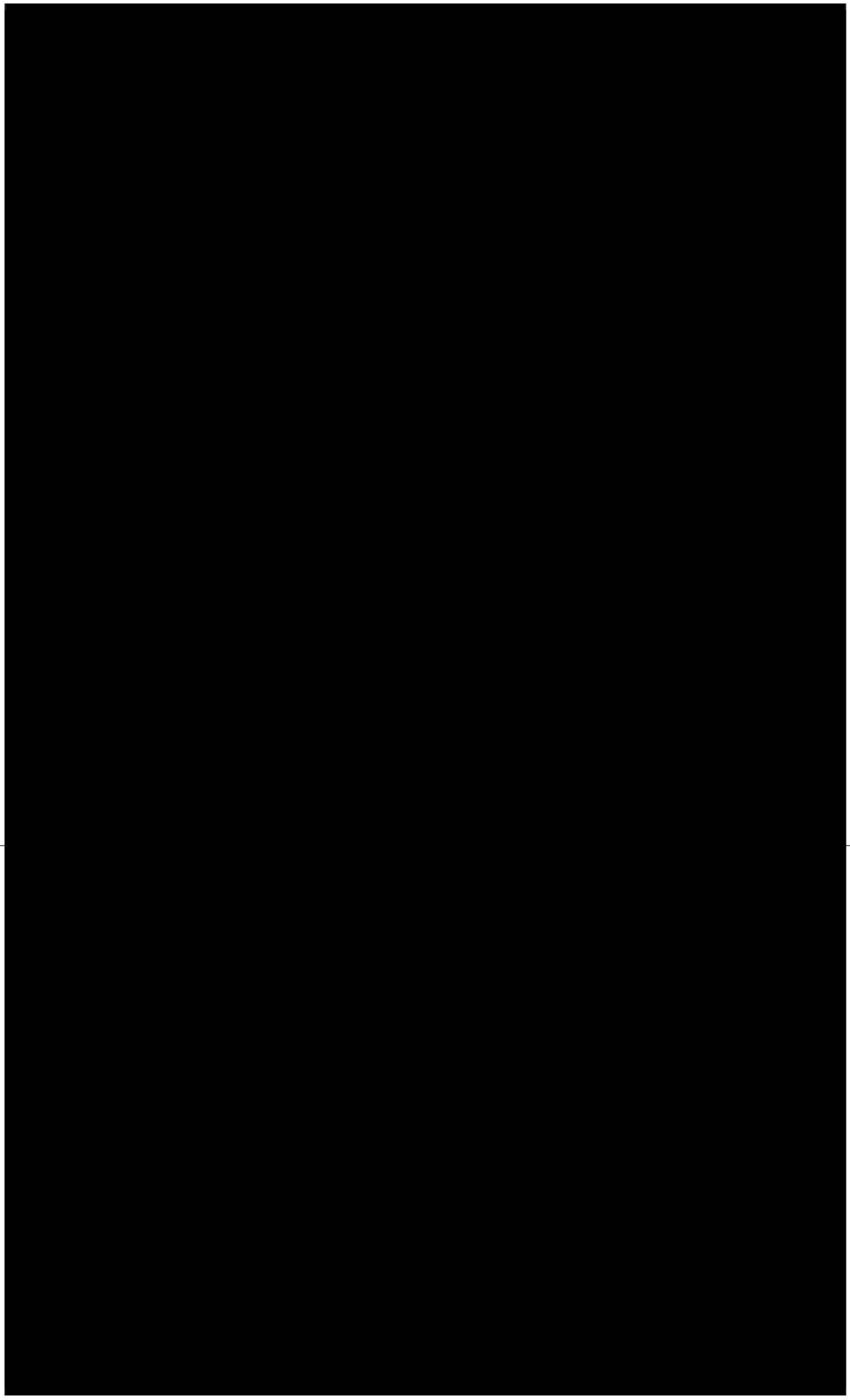


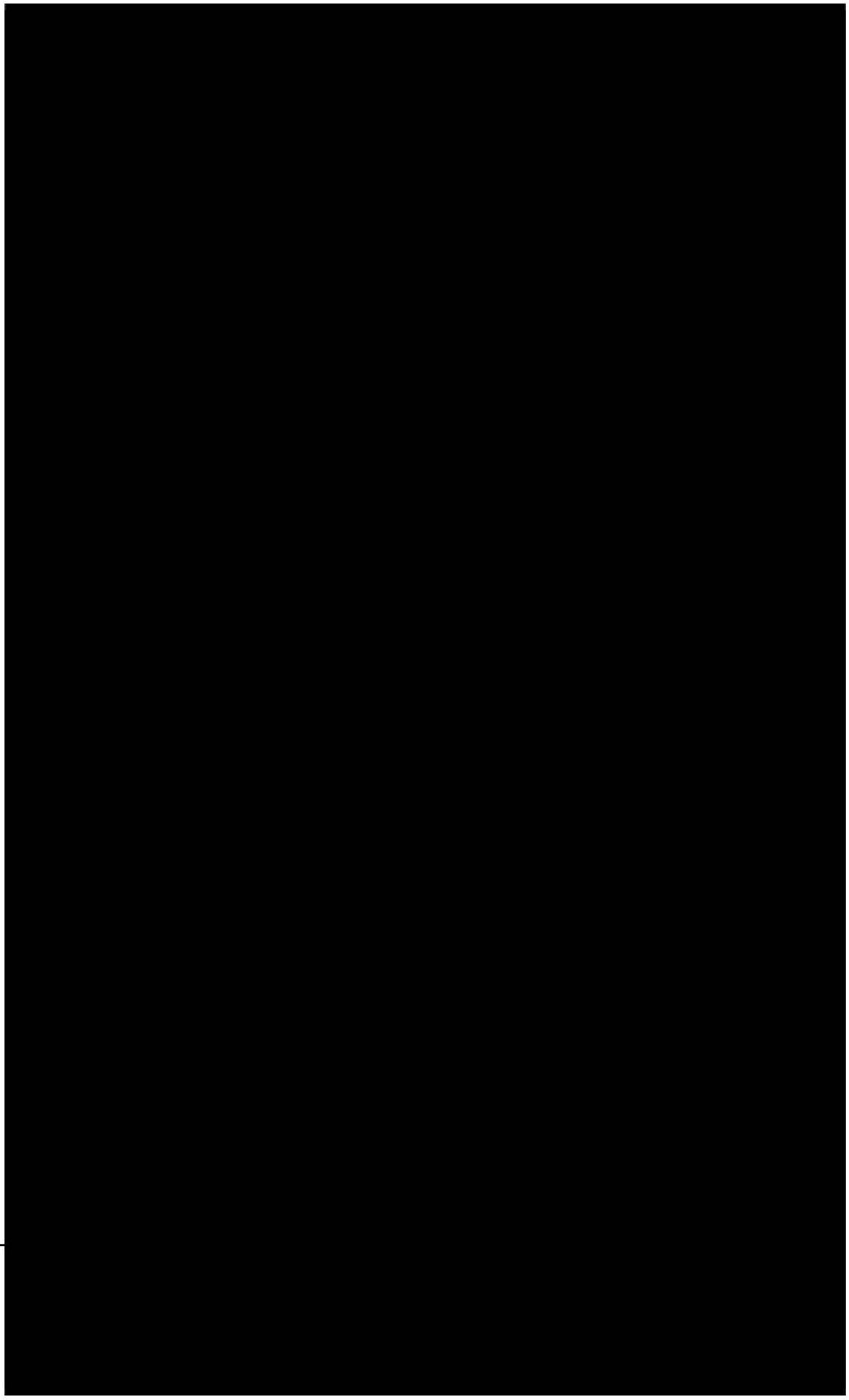


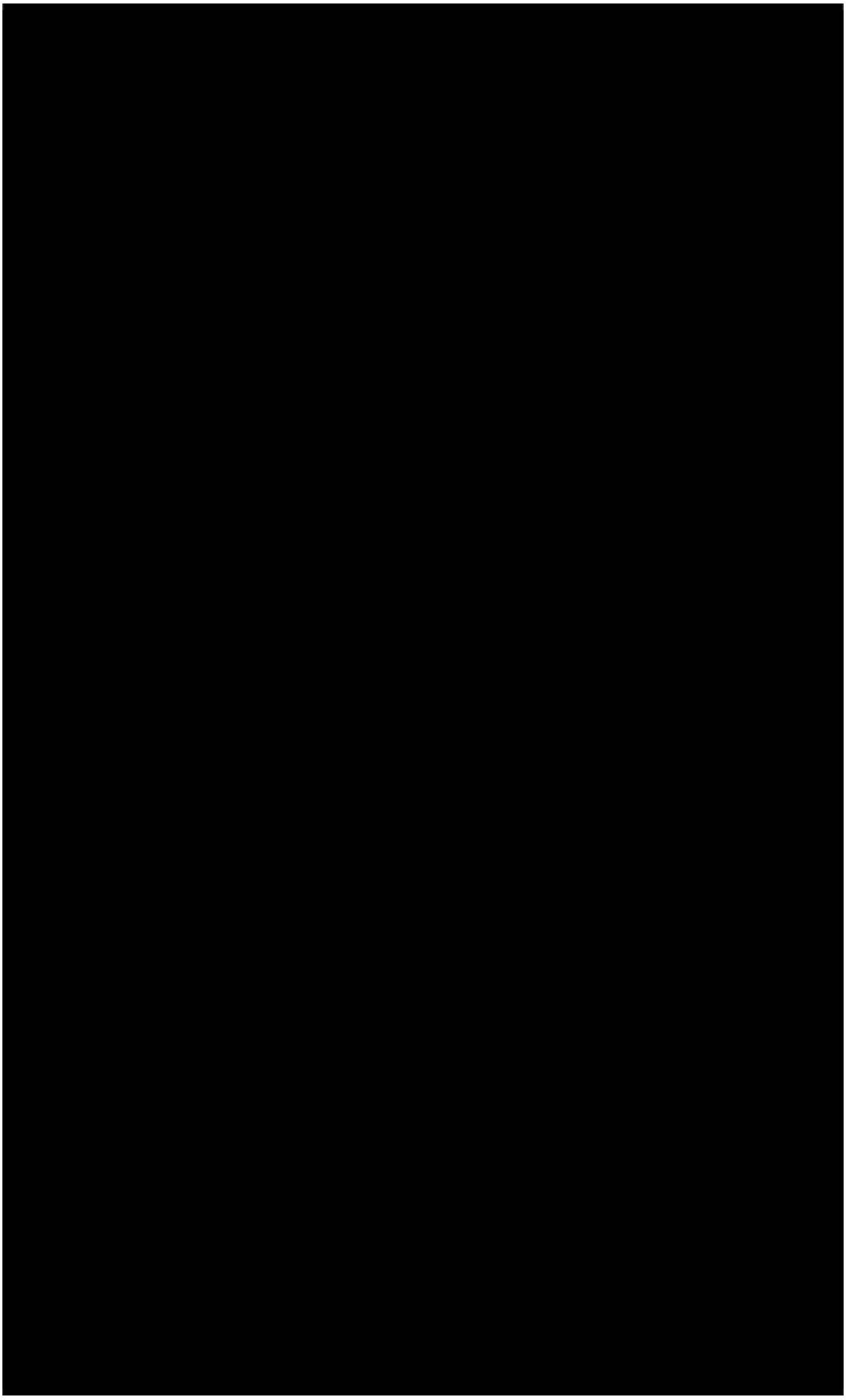


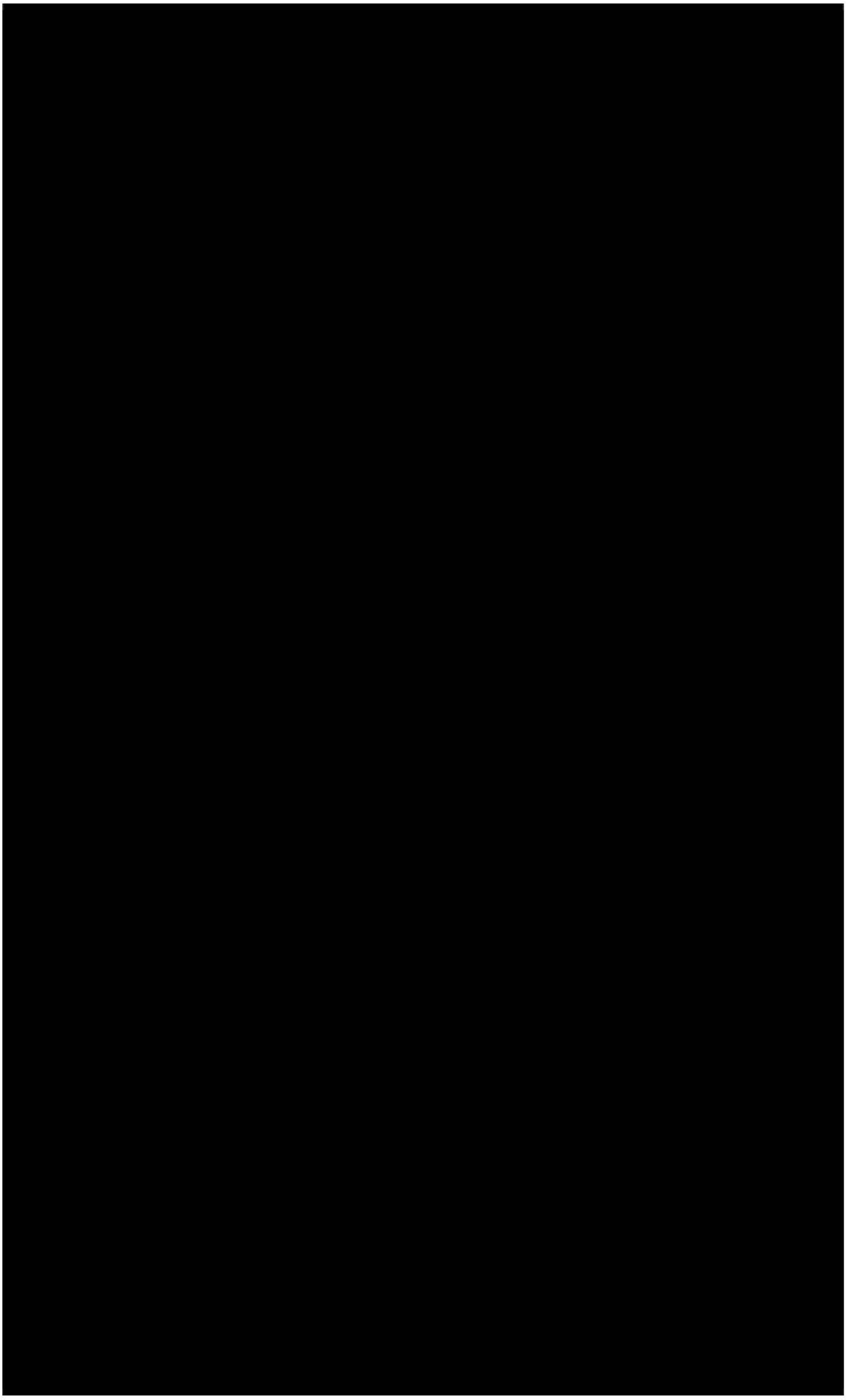


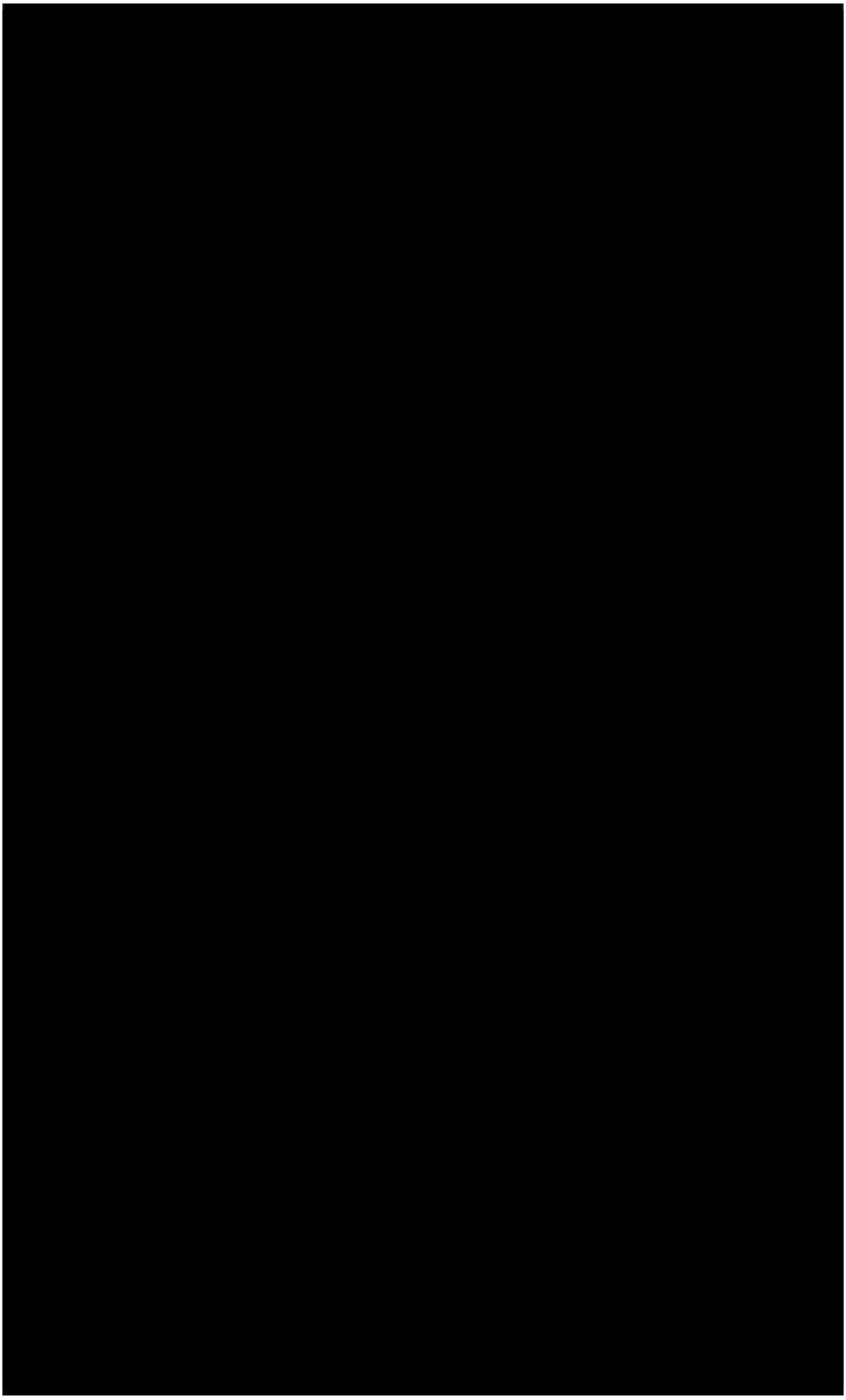


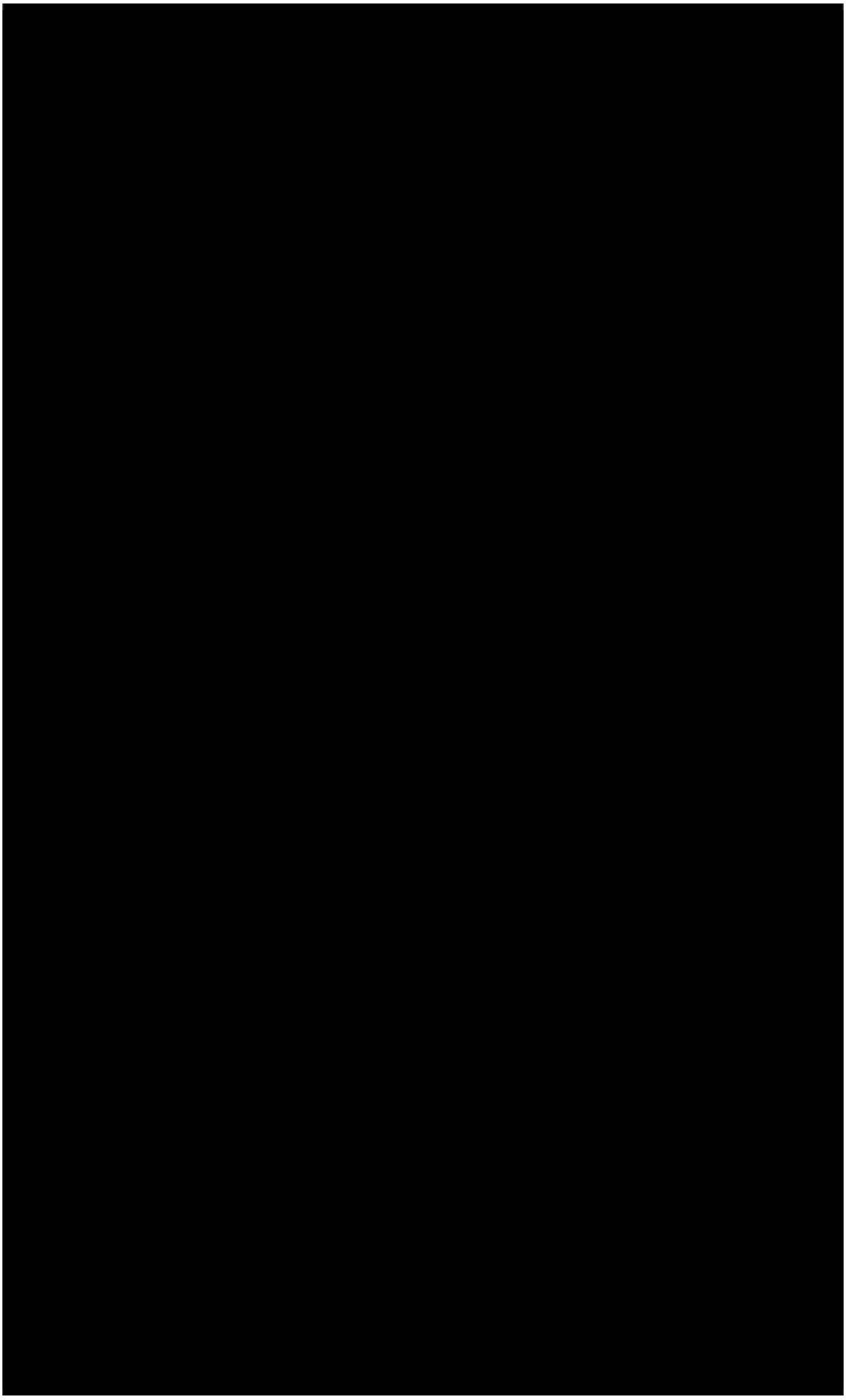


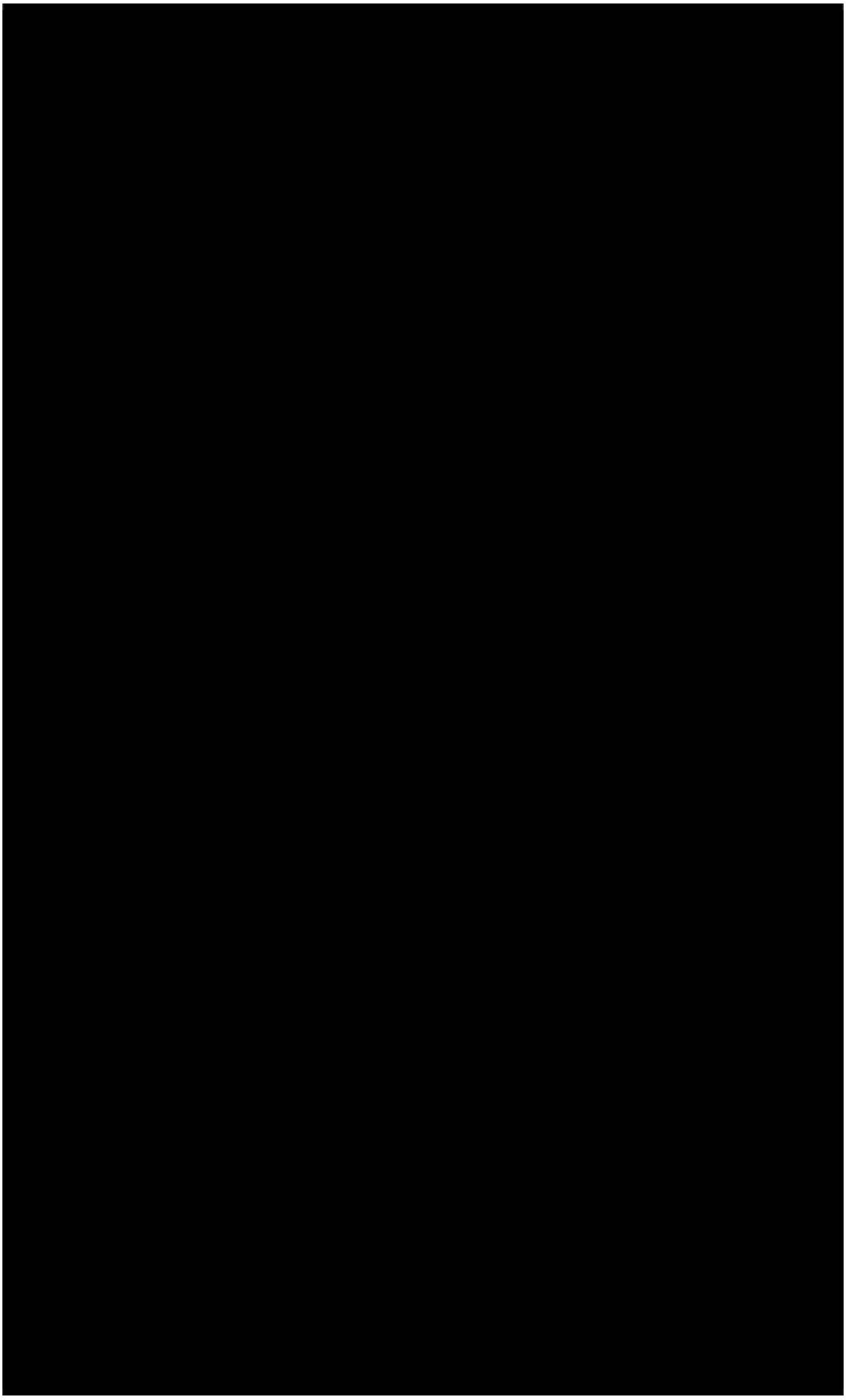


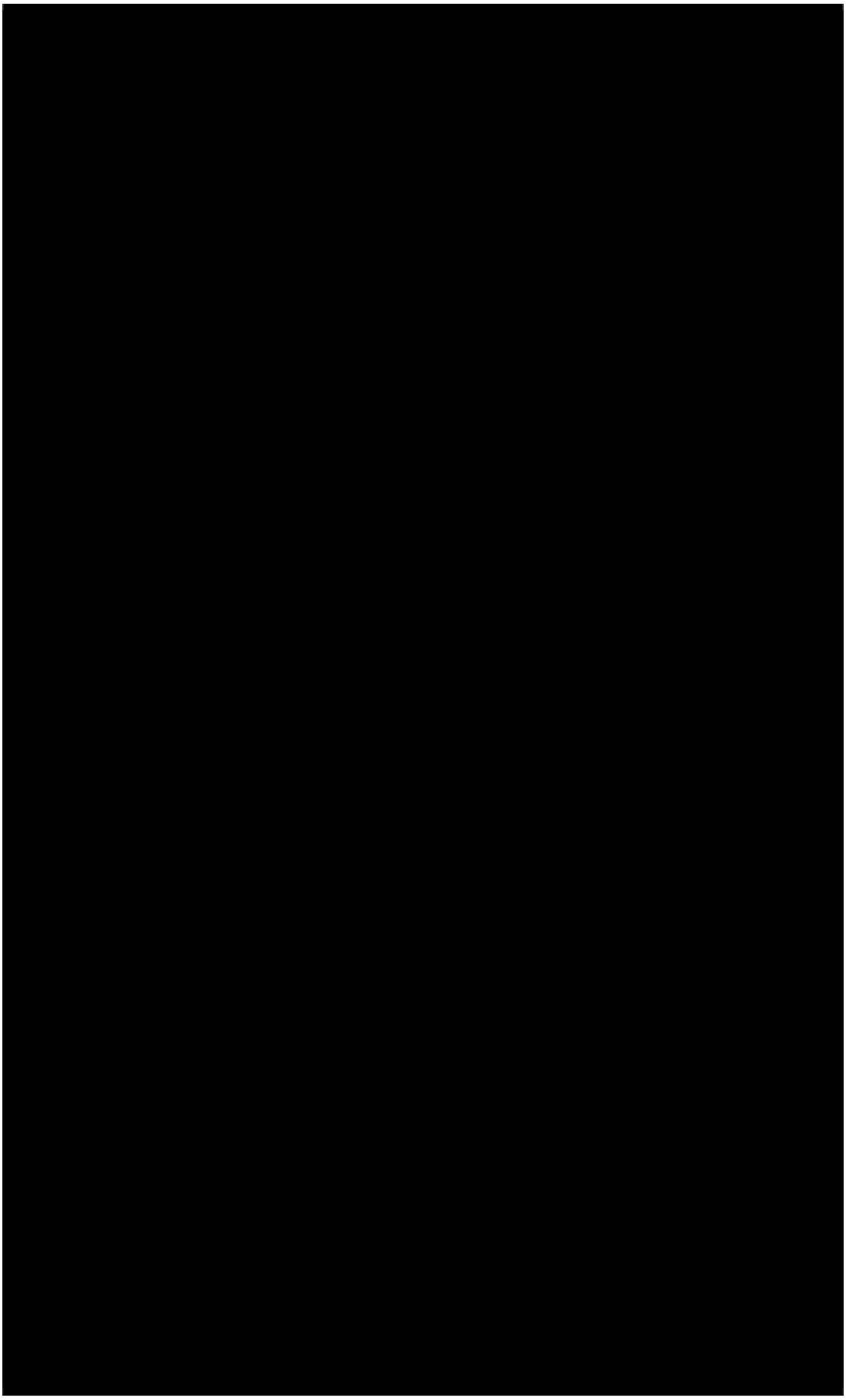


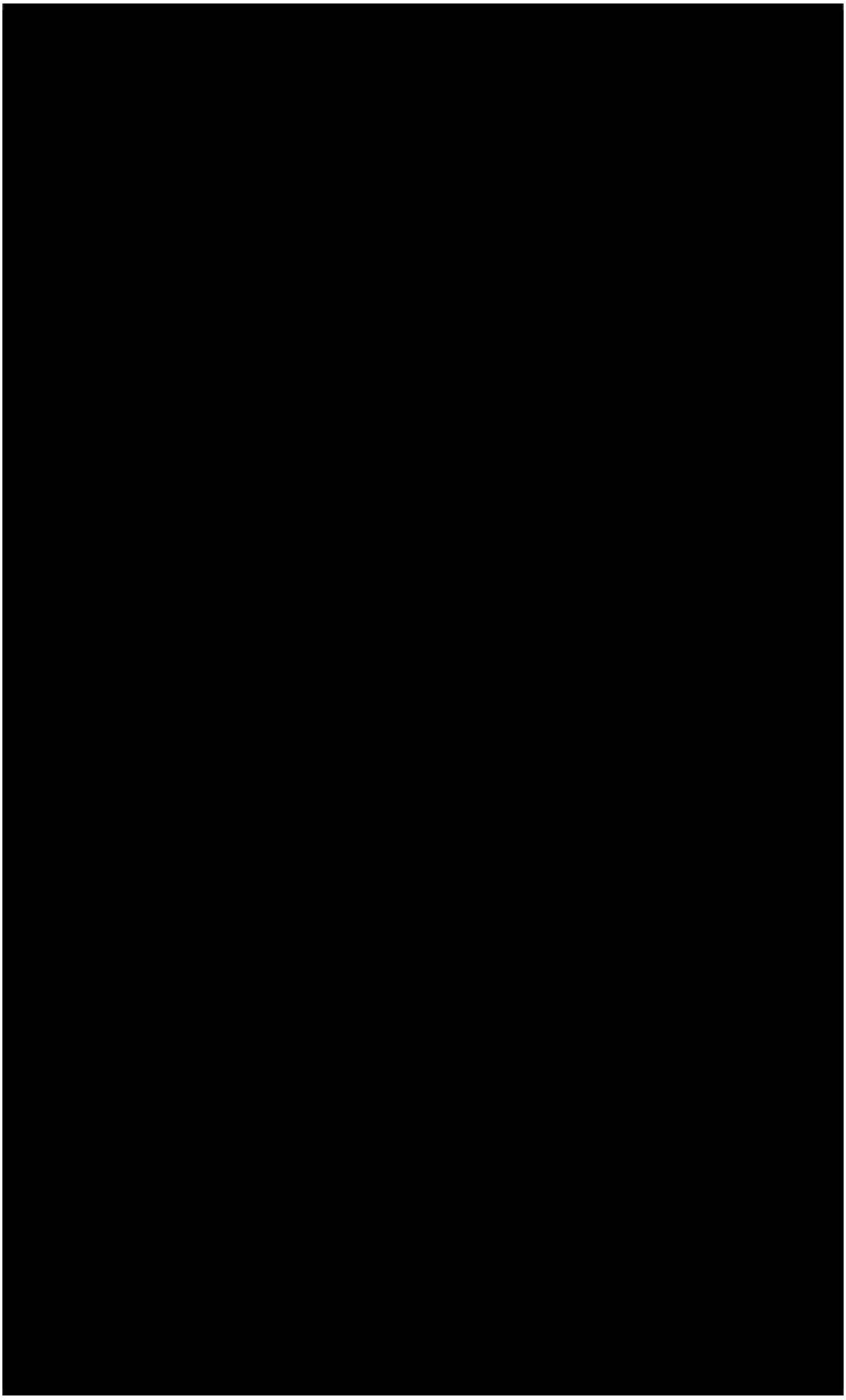


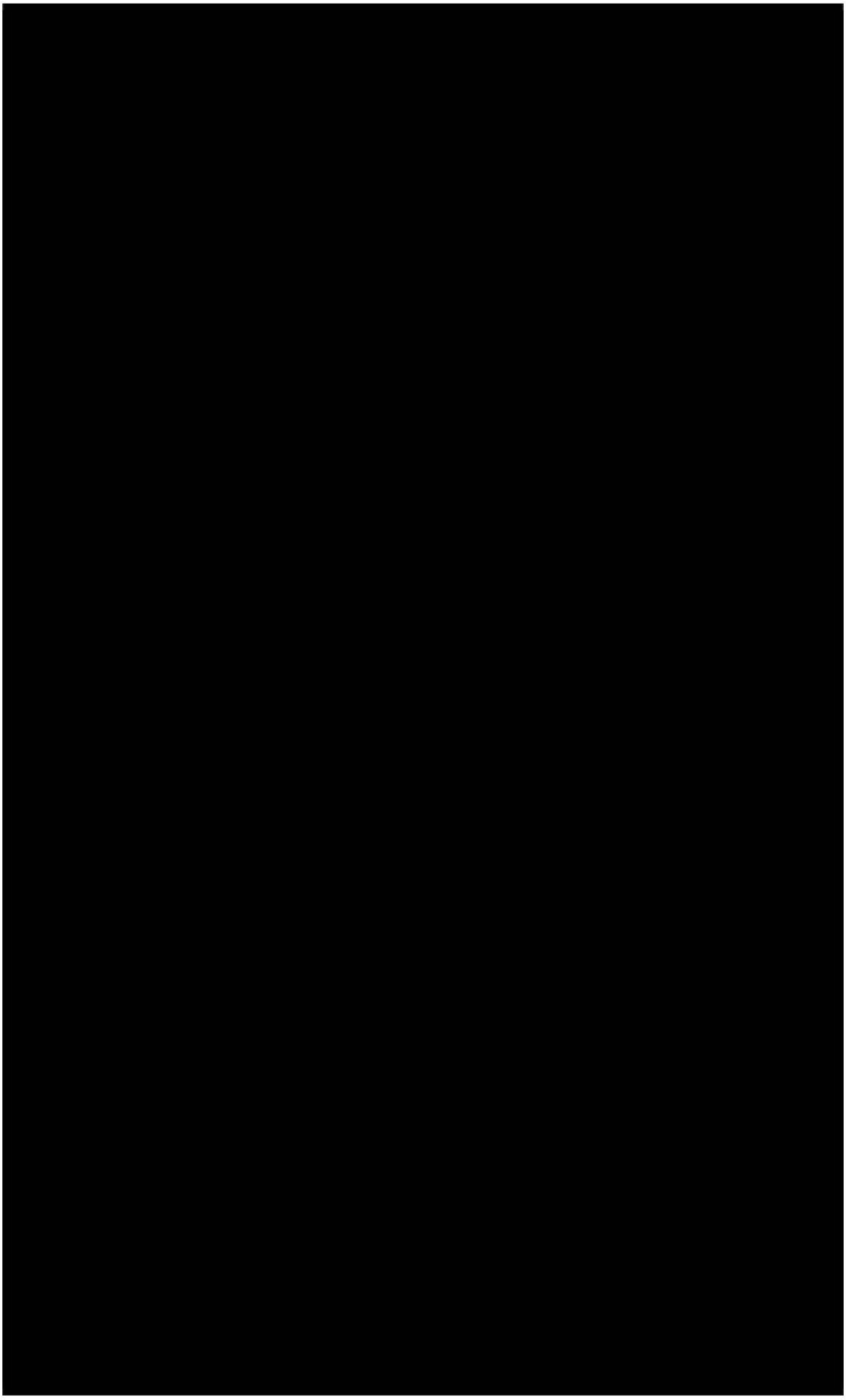


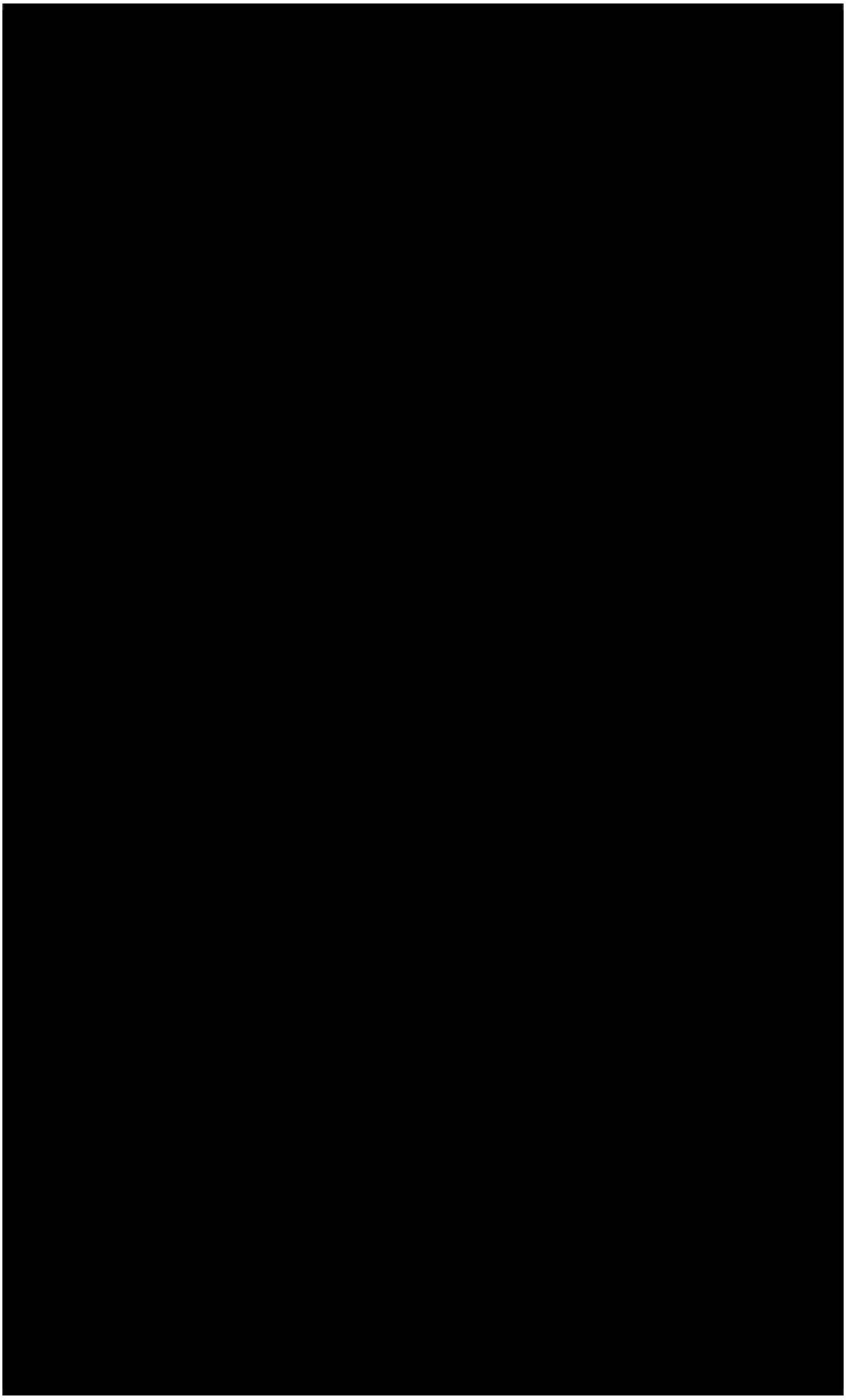












Part 2: Contract Terms