**APPLICATION TEMPLATE**

**- FOR -**

**INCLUSIVE SMART SOLUTIONS (ISS)**

**Introduction**

The Inclusive Smart Solution programme is accepting applications. The Lead Organisation should complete the form below, with the support of implementation partners (if any).

You must submit your Proposal (this completed document) in PDF format to [**ISS@carbontrust.com**](mailto:ISS@carbontrust.com).

**Submission**

Proposals with all accompanying documentation must be received by the Carbon Trust by no later than **17.00 (GMT) on 10th January 2024**.

It is your responsibility to ensure that you deliver your Proposal and any attachments by no later than the appointed time.

**Format Guidance**

* You must delete the guidance information contained in this template, from your submission. Guidance information is indicated in grey italics text e.g., *this guidance text should be deleted from your final Proposal submission.*
* Applications must be submitted in English.
* All sections must be completed.
* Section 4 and Section 5 (Value for Money) will be scored against the assessment criteria & weighting as detailed in the RFP, all other sections will not be scored but the information will be considered in determining the Solutions selected for participation in Phase 2.
* All applicable information and documents requested must be provided.
* Adhere to the page limits and word counts specified in each section.
* For templates provided, the sample text should be deleted and replaced by the applicant’s relevant text. The main headings must remain unchanged.
* The contents of the proposal should be submitted in the same order as in the template provided.
* All pages must be numbered.

**SECTION 1: Cover Letter**

*(1 page maximum) – The cover letter should be on the applicant’s letterhead (including logo) and should indicate the applicant’s interest and qualifications in implementing the proposed solution. It should include the complete contact information for the person authorised to represent the organisation and negotiate on its behalf.*

*Applicants are to fill out boxes in grey, replacing grey guidance text.*

|  |  |
| --- | --- |
| **Project title** |  |
| **Company name** |  |
| *Cover letter detail – max 250 words* | |
| **Authorised person’s signature and name** |  |
| **Authorised person’s contact details** |  |

**SECTION 2: Organisational Details**

*(1 page maximum) – This section should give details on the applying organisation, their company details, history of operation, most recent financial year turnover, etc.*

*The lead organisation should list any key partners for the implementation of the proposed solution. It should include the complete details for all partner organisations (company name, registration details, authorised representative and contact information).*

*It should include details on each organisation’s key capabilities and past performance relevant to the implementation of the proposed solution.*

*Applicants to fill out boxes in grey, replacing grey guidance text.*

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| **Lead organisation detail** | *Company Name* |
| *Address* |
| *Core business activities* |
| *Company registration number* |
| *Years in operation* |
| *Turnover in the most recent closed financial year* |
| *Contact Information & telephone number* |
| *Website* |
| **Partner organisation detail**  *[add rows as necessary for each partner]* | *Company Name* |
| *Address* |
| *Company registration number* |
| *Authorised Representative* |
| *Contact Information* |
| *Website* |
| **Key capabilities and past performance**  *[must include details from all organisations involved]* | *Answer – max 250 words* |

**Section 3: Overview of the solution**

(500 words maximum)

* *The applicant should provide an overview of the solution and its target consumers (specify any ongoing consumer engagement), how the solution will work, how the solution is suitable to Low Income and Vulnerable (LIV) energy consumers, which LIV consumer group will benefit from the solution (expected impact and any preexisting LIV consumer engagement in the solution development), and how the solution will contribute to the objectives of the ISS programme.*
* *We are interested in understanding the stage of development the solution is at and what development services would progress the solution’s maturity.*
* *Applicants should detail the role of each partner organisation (if relevant).*

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| **Provide a detailed overview of your solution**  **[how the value proposition delivers benefit to the target LIV consumer group]** |  |

**SECTION 4: Technical Proposal Details**

*(250 words per topic maximum) –*

*The application form instructs applicants to respond to specific questions that align with the assessment criteria outlined in the Request for Proposals. The responses should demonstrate how well the applicant and the proposed solution address these criteria. The assessment will be based on the information provided in the answers, and applicants are encouraged to use the Guidance Questions provided to structure their responses effectively. The overall evaluation will be conducted according to the assessment criteria framework specified in the Request for Proposals.*

*Applicants to fill out boxes in grey.*

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| **Topic 1 – IMPACT**  **Guidance Questions:**   * What difficulties faced by LIV consumers accessing, using or paying for smart energy products or services will your solution address? Provide rationale or evidence that your solution will have this impact. * How does the solution positively impact LIV consumers? * How does your solution enable LIV consumers to achieve desirable outcomes within a smart flexible energy system? |
| *Answer – max 250 words* |

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| **Topic 2 – APPEAL**  **Guidance Questions:**   * How does your solution address the needs of your targeted LIV consumer group and how can you demonstrate this? * What evidence do you have that LIV consumers are motivated to use your solution? * What are the reasons that people have chosen or would choose to buy your innovation? |
| *Answer – max 250 words* |

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| **Topic 3 – SCALE**  **Guidance Questions:**   * What system-level barriers will need to be addressed to enable your solution to scale? * What is the current and future scale of the solution for LIV consumers? * In addressing LIV consumer needs how will your solution need to adapt and what evidence do you have to support these adaptations? |
| *Answer – max 250 words* |

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| **Topic 4 – FEASIBILITY**  **Guidance Questions:**   * What aspects of your business model need testing for you to evidence that you have a viable approach to commercialising your solution? * How does your business model address different system barriers across the LIV consumer sector, enabling it to support multiple LIV consumer groups? |
| *Answer – max 250 words* |

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| **Topic 5 – COMMERCIAL**  **Guidance Questions:**   * How will your solution benefit all parties across the value chain motivating them to enable LIV consumers to access your solution? * How will LIV consumers pay for accessing your solution, how quickly will LIV consumers see the benefits from the solution realised (for example savings in their cost of energy)? |
| *Answer – max 250 words* |

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| **Topic 6 – ADDITIONALITY AND INNOVATION**  **Guidance Questions:**   * How does this solution compare to existing products or services in the market and why are they inadequate to address the challenge? * What aspects of your solution make it innovative and additional? * How will the funding you receive accelerate the whole LIV consumer sector accessing energy flexibility services? How will ISS funding enable your solution to commercialise faster? |
| *Answer – max 250 words* |

**SECTION 5: Procured services**

*(1,000 words maximum)*

*This section should include a statement of your project’s scope, its costs (up to £100,000) and impact. All financial information is to be provided in Pound Sterling (£) where appropriate outline the key steps that are needed to develop the proposed solution further.*

*Applicants should discuss an outline of how the Proposal is delivering value for money in the context of the ISS objectives, and why public funding is needed to support the commercialisation of this solution.*

*Applicants to fill out boxes in grey.*

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| **Budget** | requested (£): |
| **Provide a description of the activities that you plan to do and the items that you wish to procure** | *Answer* |
| **Provide a budget breakdown of the costs of the items you require, highlighting Labour / Materials / Services** | *Answer* |
| **Value for Money:**  **Provide a detailed statement of how your solution is providing value for money and impacting the ability of LIV consumers to participate in the transition to a flexible energy market** | *Answer – please note this question is scored* |

**SECTION 6: Additional Information and Attachments**

*(6 pages maximum) – Additional documentation requested and to be included either at the end of the Application template or as additional attachments submitted separately:*

* *Completed risk assessment (template provided below) – high-level description and rating of the most relevant risks.*
* *CVs of key staff involved (no template provided).*
* *High level timing plan to show how the procurement funding would be invested in testing the solutions feasibility*
* *Additional information the applicant considers appropriate and relevant to the proposed project, including for example references.*

Table 1 Risk Register Template

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| **Risk Description** | **Impact on Project Performance**  [Low / Medium / High] | **Likelihood**  [Low / Medium / High] | **Risk Management**  How will the risk be managed and monitored, what are the mitigating actions, and who is the risk owner] | **Escalation Point**  [At what stage will the management of this risk need to be escalated to the ISS delivery team] | **Risk score (impact x probability)** |
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