**INVITATION TO QUOTE**

**for the provision of**

Plymouth District Heat Cluster Feasibility Study

**Published** – 24/4/24

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**INTRODUCTION TO NET ZERO HUBS**

**Local Net Zero Hub Programme England**

The Department of Energy Security and Net Zero (DESNZ) Local Net Zero programme (previously the Local Energy Programme) supports local authorities and communities in England to play a leading role in decarbonisation and clean growth.

The programme was announced in 2017 as part of the Clean Growth Strategy. Funding was provided for the creation and support for five Local Net Zero Hubs (previously known as the Local Energy Hubs). The Hubs were established to promote best practice and support local authorities to develop net zero projects up to the point of commercial investment.  The new Memorandum of Understanding between Department of Energy Security & Net Zero, and the SW Net Zero Hub (2023) provides five overarching core objectives:

1. Attract commercial investment and help LAs and other local public sector bodies to develop investment models which accelerate progress to net zero.
2. Continue to increase the number, quality, and scale of local Net Zero projects being delivered across the region in line with national targets and strategies, including supporting the early-stage development and delivery of projects.
3. Collaborate with the Department to develop and support Net Zero elements to wider programmes and initiatives delivered across England, including the Transport Decarbonisation Plan and Levelling Up
4. Support a national knowledge transfer programme to improve information sharing, training, and evaluation.
5. Raise local awareness of opportunities for and benefits of local Net Zero investment

**South West Net Zero Hub**

The South West Net Zero Hub (SWNZH) is one of five Local Net Zero Hubs operational in England and is made up of over 30 Local Authorities, most of which have declared climate emergencies to attain net zero by 2030. The West of England Combined Authority is the Accountable Body and hosts the SWNZH. Hence this tender competition is being run by staff representing the SWNZH within the Combined Authority.

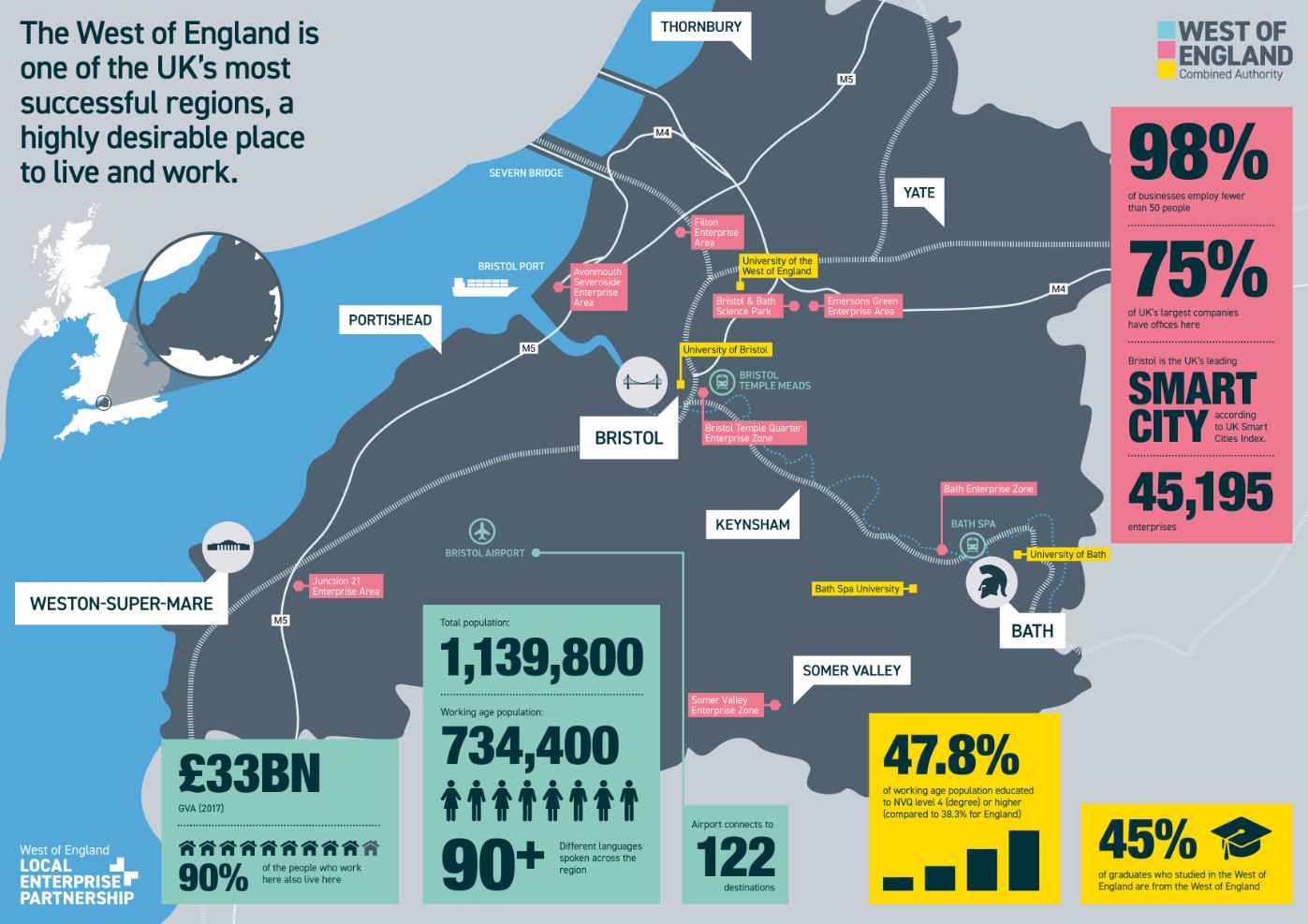
# **WEST OF ENGLAND MAYORAL COMBINED AUTHORITY**

The West of England is an economic leader with an economy worth over £33 billion a year. With a population of over 1.1 million people, one of the highest rates of employment in the country, and over 45,000 businesses, the region competes on a global scale. The West of England is a place where highly-skilled people work, where ideas flourish, and where businesses grow. It’s also a place that a diverse population of people call home.

The Mayoral Combined Authority was formed in 2017, to champion the region and drive clean and inclusive economic growth. As a result, significant powers and funding have been transferred to the region through the Mayoral Combined Authority and West of England Mayor.

Our aim is to deliver economic growth for the region and address some of our challenges, such as productivity and skills, housing and transport.

The Mayoral Combined Authority is made up of three of the local authorities in the region – Bath & North East Somerset, Bristol and South Gloucestershire. Building on a strong track record of partnership working in the region, the West of England Mayoral Combined Authority continues to work closely with North Somerset Council. The Mayoral Combined Authority also the accountable body for the West of England Local Enterprise Partnership.



# **THE REQUIREMENT**

## Introduction

In March 2019, Plymouth City Council (PCC) declared a climate emergency and pledged to make Plymouth carbon neutral by 2030, exceeding the UK-wide climate objectives to achieve net zero by 2050.

In response, Plymouth City Council published annual Climate Emergency Action Plans (CAEP), setting out the actions they are taking, alongside other partners in the Plymouth Net Zero Partnership, to reduce emissions across Plymouth. Since then, the council has published their Net Zero Action Plan (NZAP) which outlines how it will reduce emissions within its direct control and encourage the wider city to do the same, set out across four themes (transport, buildings, heat & power, consumption & waste and behaviour change).

As part of its overall objective of reducing the City’s carbon footprint, PCC has started to deliver catalyst strategic heat network infrastructure in the City. Proposals for District Energy in Plymouth have been subject to several feasibility studies, dating back to 2009. Funding from the Heat Networks Delivery Unit (HNDU) has supported this citywide strategy with detailed feasibility work across Plymouth.

The Council is also one of the 28 towns and cities participating in the Department for Energy Security and Net Zero’s Heat Network Zoning (HNZ) pilot programme, which aims to develop heat networks in zones where they provide the lowest cost, low carbon heat to consumers.

A key action to delivering on Plymouth’s heat network ambitions includes reviewing opportunities for marine source/shallow geothermal heat pumps along the waterfront areas of the city. Previous work includes an assessment of five possible site options across the city’s waterfront areas for marine source heat pump suitability as well as other studies assessing groundwater resources and how these might be utilised for district heat networks. Outputs from these studies identified the National Marine Aquarium (NMA) area as a potential site for a marine source heat pump as well as a location for shallow geothermal resources.

## What will the Project deliver?

This study aims to investigate the feasibility of a localised district heating cluster in the Sutton Harbour area of Plymouth with a primary focus on assessing the shallow geothermal opportunities within the local area. The study has a specific focus on identifying a connected solution for the National Marine Aquarium (NMA) site as a key anchor load, alongside other local buildings.

As a secondary focus, the study aims to identify other heat sources and future networks that could augment or link to the identified scheme.

The study aims to enable PCC to determine whether to progress to a detailed techno-economic feasibility study on any proposed heat network, either as a standalone cluster or as part of a wider City scheme.

The objectives of this study are to:

1. Assess the viability of a shallow geothermal (filtered seawater) heat pump (as well as other counterfactuals), as a low carbon heat source at the NMA site and surrounding cluster of buildings within the Sutton harbour area
2. Assess heating and cooling loads within the area that are appropriate for the development of a heat network scheme, alongside opportunities to recover waste heat from refrigeration and cooling
3. Determine potential energy centre locations and network routes
4. Undertake a high-level economic assessment
5. Assess the viability of any local scheme identified as a standalone scheme but also with an opportunity to act as a node for connection into a wider city strategic scheme
6. Identify the next steps for recommended options

## Specification – Detailed Description of Commission

* + 1. **Area of Interest**

The area of interest for this study is the Sutton Harbour area of Plymouth. This area hosts several potential heating loads for connection to a heat network scheme including the NMA site, social and private housing, the University of Plymouth site and the fish market (with cooling requirements). The study should assess these pre-identified loads and is open to the identification and assessment of other opportunities within the area.

The key anchor load of this study (NMA) is a complex building with high heat demand and critical animal life support needs (coming under zoo legislation) and will therefore require extensive engagement throughout this study.

* + 1. **Scope and Requirements**

The outputs of this work must provide PCC with a clear and justifiable basis upon which to understand the potential for a shallow geothermal seawater heat pump approach to provide heat to the Sutton Harbour area via heat networks and how this may best be delivered. It should also be enough to enable PCC to determine whether to progress any local scheme identified, either as a standalone scheme or as part of a wider City scheme, to a more detailed techno-economic feasibility work.

The study should:

|  |
| --- |
| **R1. Low Carbon Heat Supply and Energy Centre Options** |
| **Provide a quantitative and qualitative assessment of the feasibility of a shallow geothermal seawater heat pump approach as the low-carbon heat supply for the scheme. This should include:**   1. identification of suitable shallow geothermal resource opportunities, outlining; location, system type, number and depth of boreholes required, intake and discharge locations etc 2. identification and assessment of possible energy centre locations, outlining the criteria used to assess options 3. initial scheme design and scale drawings for the energy centre sufficient to give an estimated capital cost and space requirement 4. an assessment and justification for the sizing of the system and thermal storage 5. recommendations for the approach to peak and backup provision including clear justification as to why the backup has been selected at the recommended level 6. determination of capital costs 7. counterfactual evaluation against other low-carbon source options 8. identification of other heat sources that could augment or provide future links to the network (e.g. waste heat opportunities) in the local cluster 9. Undertake a high-level economic assessment with a breakdown of the main cost elements 10. Determine CO2 emissions and savings against the counterfactual for the initial technology lifetime and the full scheme lifetime |
| **R2. Energy Demand Assessment** |
| Identification and assessment of key heat loads within the local cluster, including pre-identified potential loads (see Section 1.3). This should:   1. Identify both current and future energy demands covering heat and cooling including:  * Annual peak heat * Annual heat demand   Current energy demands should be based on half-hourly metered data. Where not possible, monthly billing data should be used. Where neither of the above are possible, consumption should be modelled according to best practice. Hourly demand profiles and benchmarks should be used as a last resort.   1. Provide a summary table of all energy demands including the following columns:  * Building name/identifier * Building type * Peak and annual demand * Data source * Data resolution (e.g. half hourly, monthly) * Temperature (if known or otherwise assumed) * Efficiency, age and capacity of plant within each building * Counterfactual heating solution (existing or proposed) |
| **R3. Distribution Options** |
| Undertake an initial assessment for connecting identified buildings and determine network route options in the short and long term, including future expansion/connection opportunities |
| **R4. Stakeholder engagement** |
| Participate and support the engagement in attendance at meetings (led by the SWNZH and PCC) with key stakeholders involved in the identified scheme. |
| **R5. Initial Economic Case Assessment** |
| Undertake an initial economic assessment model to include:   1. High-level determination of cost and revenue streams, including current energy, operation and maintenance (O&M) costs. 2. Determine the Internal Rate of Return (IRR) and Net Present Value (NPV) at an appropriate discount rate over a 25, 30 and 40-year project life. It is expected these values will be a range at this stage. In the case of sub-economic results, a brief outline of how changes to the proposed scheme could improve this should be included. 3. Determine CO2 emissions (clearly outlining the methodology) and compare these against the existing and counterfactual heat supply technologies. This should be reported as the carbon intensity (kgCO2e/kWh) of the heat supplied for the proposed network and counterfactuals and as carbon saved per annum (tCO2e), over the lifetime of the original generating assets and the expected lifetime of the project. 4. Determine the funding options (including grant funding) to deliver the scheme. 5. Provide a breakdown of and rationale for the contingencies applied to costs within the assessment. This should take into account the level of design and the confidence that can be attached to the sources of cost data used. 6. Undertake sensitivity testing of the results.   The cash flow model must include a breakdown of how the heat tariff(s) has been derived and how it relates to existing and low-carbon counterfactuals energy costs.  Energy tariffs should clearly differentiate between the variable portion, fixed price portion and connection charge for key customer groups; the model should also generate an estimate of customers’ annual energy bills. Energy tariffs should be compared with the project’s unit cost of generation.  Where the counterfactual energy costs are linked to gas, consultants should consider modelling a higher heat tariff as a sensitivity to understand the impact on scheme economics and overall viability. |
| **R6. Risk Management** |
| Produce a risk register that identifies risks and issues to any potential scheme. This should include risk impact, likelihood, mitigating measures, impact of mitigating measures and responsibilities.  Key outstanding risks should outline how the next stage of work progresses. |
| **R7. Recommendations for next steps** |
| Recommend whether any proposed scheme is viable as a standalone or as part of a wider network and outline costs and timelines for recommendations/next steps. |
| **R8. Site visits** |
| To meet the above requirements, the successful Supplier must undertake at a minimum, 1 site visit during the study. This should align with project meetings with the SWNZH and other key stakeholders, as outlined in Section 1.8. |

* + 1. **Alignment with HNDU and GHNF**

The outputs of this study should enable PCC to apply for any future funding for a detailed techno-economic feasibility study on any proposed heat network, either as a standalone scheme or as part of a wider City scheme.

Those tendering for this work will note that parts of the specification align closely with the specification used previously by the HNDU for heat mapping studies. Whilst this study is not HNDU supported, it is expected the Supplier will, where relevant, meet the standard specifications set out for a HNDU-funded energy mapping study.

The scope should also align with the latest guidance on the Green Heat Network Fund (GHNF) in relation to the Carbon Intensity of the project. Broadly this should be designed to carbon intensity which is, at least, better than circa 100gCO2e/kWh unless otherwise stated by the client or the stakeholder. Below is a table providing the metrices associated with the GHNF.

|  |  |
| --- | --- |
| **Metric** | **Minimum Score** |
| Carbon gate | 100gCO2e/kWh thermal energy delivered |
| Customer detriment | Domestic and micro-businesses must not be offered a price of heat greater than a low carbon counterfactual for new building and gas/oil counterfactual for existing buildings |
| Social IRR | Projects must demonstrate a Social IRR of 3.5% or greater over a 40-year period |
| Minimum demand | For urban networks, a minimum end customer demand of 2GWh/year. For rural networks, a minimum number of 100 dwellings connected |
| Minimum capex | Combined grant requested up to but not including 50% of capex + commercialisation costs |
| Capped award | The total 15-year kWh of heat/cooling forecast to be delivered will not exceed 3.33 pence of grant per kWh delivered (subject to review by GHNF) |
| Non-heat/cooling cost inclusion | For projects including wider energy infrastructure in their application, the value of income generated/costs saved/wider subsidy obtained should be greater than or equal to the costs included |

In addition to the below specification, the study should ensure consistency and alignment with the CIBSE Heat Network Code of Practice (CP1) (2020) requirements.

* + 1. **Previous work of relevance**

This project should consider and build upon the evidence from previous studies of relevance outlined below:

* Plymouth Marine Heat Pump Appraisal (2021)
* Plymouth Geothermal Energy ‘Peer Review’ Assessment (2021)
* NMA Energy Efficiency, Carbon Reduction & System Redundancy (2020)
* NMA Energy Audit (2015)

Relevant studies will be provided to the successful Supplier upon kick-off of the project.

* + 1. **Outputs**

All draft and final outputs will be reviewed by the SWNZH and Plymouth City Council and will only be signed off when the SWNZH are satisfied that any comments identified have been adequately addressed.

**Please note: scheduled payment of invoices will be made upon successful completion of milestones (see Section 1.3.6.)**

The outcomes should align with the specification outlined above and should be delivered as follows:

* + - * 1. **A final report** (in both PDF and MS Word format) covering the above requirements for the scheme(s) explored. This should include all technical model inputs and key assumptions with data sources. This should be provided as separate MS Excel sheets for subsequent use by any future appointed parties for unlicensed use.

1. A standalone **Executive Summary** of no more than 5 pages to include:

* A summary of the scheme in relation to local strategies, policies and programmes
* A description of the project alongside a map of the preferred heat network
* A summary of the capital investment for both initial and full-phase schemes including options for grant funding where required
* A summary of the key benefits over a 25- and 40-year time period (including Project IRR, NPV and carbon savings per annum)
* A summary of the key benefits (e.g. cost, carbon and tariff) to wider stakeholders
* A summary of key risks and issues alongside a high-level deliverability assessment
* Recommendations for further work (if applicable) and next steps.

1. Associated **GIS** outputs (e.g. ‘Shape’ files)
2. 1-hour **MS Teams presentation** **of findings** to relevant stakeholders. Presentations should be provided in MS PowerPoint (or equivalent).
   * 1. **Reporting and Milestones**

It is anticipated that the project will begin in June 2024 (see Section 2 for the procurement timetable) and will last for 16 weeks until September 2024, with a draft report and initial findings available by early August 2024.

|  |  |
| --- | --- |
| **Week** | **Output** |
| 1 | Inception Meeting with SWNZH and PCC to agree on project plan |
| 10 | Draft report and initial findings presentation |
| 16 | Final report and presentation |

It is expected the project will be managed by a Project Manager in the SWNZH with input from Plymouth City Council at key decision points:

* **SWNZH Project Manager –** first point of contact and contract manager
* **Plymouth City Council –** key council decisions, output reviews, source of key stakeholder contacts

The Supplier’s project manager leading the project will be responsible for day-to-day contact with the SWNZH and should have demonstrable experience of designing and delivering district heating schemes.

The SWNZH will be the first point of contact for engagement with stakeholders. Any planned communication with stakeholders should, in the first instance, be discussed and agreed upon with the SWNZH project manager.

The minimum requirements for meetings and reporting are as follows:

* Project inception meeting
* Fortnightly progress update meetings with the supplier’s key project manager and key project team (where relevant) – via MS Teams
* Draft final report review meeting
* Site visits – cost for a minimum 1 day which shall be coordinated with the above meetings

## Terms of Contract

Delivered according to the **MCA Low-Value Service Terms & Conditions (Appendix B)**. Please note that by submitting a bid you are acknowledge that the authority’s terms and conditions are mandatory. As payments are issued from a public fund, all intellectual property arising from the contract scope shall give the full rights to authority to use the outcome deliverables from the project including the submitted bid.

## Contract Value

The indicative budget range available for this project is up to £24,999.000inclusive of all fees, expenses and exclusive of VAT, if this is expected to be insufficient, please advise via clarification.

# **INSTRUCTIONS TO BIDDERS**

## E-Quote System

The Mayoral Combined Authority uses ATAMIS as its e-procurement system. Suppliers will need to register at <https://weca-atamis.my.site.com/s/Welcome> to access full documents and submit proposals. Assistance in relation to the e-procurement system is available to suppliers via the Help Desk. .

## Register Intent or opt out

Once the Quote Information has been viewed suppliers will be able to click on “Register Intent” which will inform the Authority of your intention to respond to this opportunity.

If a supplier does not wish to or is unable to submit a Quote and not interested in proceeding, then they are required to click on “Opt Out” to decline the opportunity.

## Preparation of Quote

Suppliers must obtain for themselves all information necessary for the preparation of their Quote response and all costs, expenses and liabilities incurred by the supplier in connection with the preparation and submission of the Quote shall be borne by the supplier, whether or not their offer is successful.

Information supplied to the supplier by Authority staff or contained in Authority publications is supplied only for general guidance in the preparation of the Quote. It shall remain the property of the Authority and shall be used only for the purpose of this procurement exercise.

Suppliers must satisfy themselves as to the accuracy of any such information and no responsibility is accepted by the Authority for any loss or damage of whatever kind and howsoever caused arising from the use by suppliers of such information.

## Pricing Schedule

As part of your return in response to the ITQ please provide a breakdown of how you expect to allocate your proposed budget (in pounds sterling (£s) between your partners (staff)/subcontractors (if any) and assigned by deliverable element(s) you are proposing by completing **Appendix A – Pricing Schedule.**

Please note that these prices should be exclusive of VAT.

## Other Documents or Supporting Evidence

If instructed to do so within the e-procurement system, the supplier must complete and upload other documentation that may be provided with this Invitation to Quote, or upload evidence to support their submission.

Documentation: Do not include any macro enabled spreadsheets or embedded documents. Acceptable file formats are: *txt, rtf, mpp, vsd, dwg, rar, msg, ics, html, gif, jpg, png, jpeg, tiff, tif, zip, pdf, doc, xls, ppt, docx, xlsx, pptx, mp3, mov, m4a, swf, wmv, mpg, mpeg, avi, wav, odt, odp, ods, numbers and pages*. If you are uploading multiple documents, it is recommended that you zip them using WinZipor WinRAR

Quotes must not be qualified or conditional. Only Quotes submitted without qualification will be accepted for consideration. If a Quote is excluded from consideration, the supplier will be notified.

## Submission Deadline

Suppliers are required to submit their Quote within the e-procurement system by **15:00** on **17/05/2024** and should allow enough time to complete questions and upload documentation where requested to do so. Quotes received after the closing date will not be considered and will result in the Authority rejecting the Quote as a Fail / Non-compliant Quote. Emailed or hard copy Tenders will not be accepted.

The Authority is under no obligation to consider partial or late submissions.

If the Authority issues an amendment to the original Quote and if it regards that amendment as significant, an extension of the closing date may, at the discretion of the Authority, be given to all Organisations.

The Authority expressly reserves the right to require a supplier to provide additional information supplementing or clarifying any of the information provided in response to the requests set out in the Quote. However, the Authority is not obliged to make such requests.

Suppliers shall accept and acknowledge that by issuing this ITQ the Authority shall not be bound to accept any Quote and reserves the right not to conclude a Contract for some or all of the services for which Quotes are invited.

## Quote Validity

The Quote should remain open for acceptance for a period of 60 days. A Quote valid for a shorter period may be rejected.

## Communication

All contact and communication during this procurement should be submitted in writing through the e-procurement system including any clarification questions in sufficient time before the closing date, to enable to the Authority to respond to all suppliers. It is not acceptable for suppliers to seek clarifications via telephone or e-mail outside of the e-procurement system.

## Confidentiality

The supplier must keep confidential and will not disclose to any third parties any information contained within their bid. They shall not release details other than on an ‘In Confidence’ basis to those whom they need to consult for the purpose of preparing the Quote response, such as professional advisors or joint bidders.

The Quote shall not be canvassed for acceptance or discussed with the media, any other Organisation, member/officer of the West of England Mayoral Combined Authority, or their representatives. Any supplier trying to exert any undue influence during the tender process could be excluded from the process.

## Disclaimer

Neither the Authority, [nor any relevant Other Contracting Bodies], nor their advisors, respective directors, officers, members, partners, employees, other staff or agents:

* make any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the ITQ; or
* accepts any responsibility for the information contained in the ITQ or for their fairness, accuracy or completeness of that information nor shall any of then be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.
* Can be responsible for any costs you may incur in preparation and submission of your bid

Any resulting Contract shall be governed by English law.

## Freedom of Information Act

Suppliers should note that the Authority is subject to the ‘Freedom of Information Act 2000’. Suppliers are requested to state which part, if any, of the information supplied with their Quote is confidential or commercially sensitive or should not be disclosed in response to a request for information and why. Suppliers’ statements will be considered however the Authority is unable to give any guarantee that the information in question will not be disclosed.

## Transparency

Suppliers and those organisations who bid should be aware that if they are awarded a contract, the resulting contract between the supplier and the Authority will be published under the government transparency policy. To view details of what we must publish, see the Local Government Transparency Code 2015 at [Local Government Transparency Code 2015](file:///S:/Corporate%20Procurement%20Team/Procurement/Transparency%20Code%202014/Local%20Government%20Transparency%20code%202015.pdf)

The Authority is required to publish details of all expenditure over £500 made to its suppliers and all contracts and framework agreements over £5000.

Details will be published on the Authority’s website and the government’s transparency website (data.gov.uk) and Contracts Finder.

## Procurement Timetable

The indicative timetable for this procurement is set out below. This is intended as a guide and, whilst the Authority does not intend to depart from the timetable, it reserves the right to do so at any time.

|  |  |
| --- | --- |
| Publish on | 24th April 2024 |
| Clarifications received by | 3rd May 2024 |
| Clarifications responded by | 10th May 2024 |
| Submissions by | 17th May 2024 |
| Award | 31st May 2024 |
| Contract starts | 3rd June 2024 |

## Required documents

Within this process suppliers have been provided with the following documentation. Where indicated these are required to be completed and uploaded within the e-procurement system.

You may choose the format of our submission; however, you must clearly state the question we are asking and proceed with your response. You may submit appendices to support your response, but they will only be considered if they are clearly referenced in your response and are clearly identifiable. Numbering or lettering your appendix as well as a title will meet this requirement.

|  |  |
| --- | --- |
| **DOCUMENT TITLE** | **COMPLETE AND RETURN** |
| Section 1 - The Requirement including Specification |  |
| Section 2 - Instructions to Suppliers |  |
| Section 3 - Questionnaire |  |
| Section 4 - Evaluation |  |
| Appendix 1: Non-Collusion Certificate |  |
| Appendix A: Pricing Schedule |  |
| Appendix B: MCA Low-Value Service Terms & Conditions |  |

Please Note: The completion and electronic return of all the documents ticked above is mandatory.

# **QUESTIONNAIRE**

The purpose of the Questionnaire is to enable the Authority to assess supplier suitability for providing goods and services.



## Notes for completion

i) Please ensure that all questions are completed in full, and in the format requested. Failure to do so may result in your submission being disqualified. If it does not apply to you, please state clearly ‘N/A’.

ii) Should you need to provide additional Appendices in response to the questions, these should be numbered clearly and listed as part of your declaration.

iii) Please return a completed version of this document with your Quote submission using the e-procurement system.

**Verification of Information Provided**

iv) Whilst reserving the right to request information at any time throughout the procurement process, the Authority may enable the Supplier to self-certify that there are no mandatory/ discretionary grounds for excluding their organisation. The Authority will request evidence from the winning Contractor only after the final Quote evaluation decision.

**Sub-contracting arrangements**

v) The Supplier should advise in a separate appendix the names of sub-contractors, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for.

**Confidentiality**

vi) The Authority reserves the right to contact the named customer contact in section 6 regarding the contracts included in section 6. The named customer contact does not owe the Authority any duty of care or have any legal liability, except for any deceitful or maliciously false statements of fact.

vii) The Authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the Public Contract Regulations.

## Questionnaire (General Information)

|  |  |
| --- | --- |
| **Contact details** | |
| Supplier contact details for enquiries | |
| Name |  |
| Postal address |  |
| Phone |  |
| Mobile |  |
| E-mail |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Registered company/charity number |  | | | |
| Registered VAT number |  | | | |
| Name of parent company |  | | | |
| Please mark ‘X’ in the relevant box to indicate your trading status | i) a public limited company | ▢ Yes | | |
| ii) a limited company | ▢ Yes | | |
| iii) a limited liability partnership | ▢ Yes | | |
| iv) other partnership | ▢ Yes | | |
| v) sole trader | ▢ Yes | | |
| vi) other (please specify) | ▢ Yes | | |
| Please mark ‘X’ in the relevant boxes to indicate whether any of the following classifications apply to you | i)Voluntary, Community and Social Enterprise (VCSE) | ▢ Yes | | |
| ii) Small or Medium Enterprise (SME) [[1]](#footnote-2) | ▢ Yes | | |
| iii) Sheltered workshop | ▢ Yes | | |
| iv) Public service mutual | ▢ Yes | | |
| **Bidding model** | | | |  |
| **Please mark ‘X’ in the relevant box to indicate whether you are;** | | | |  |
| 1. Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself 2. b)      Bidding as a Prime Contractor and will use third parties to deliver some of the services | | | ▢ Yes  ▢ Yes |  |

# **EVALUATION AND AWARD**

Quotes will be evaluated to find the most suitable supplier who can meet the Specification and provide competitiveness of price. The award will be based on the evaluation criteria as outlined in the table below.

Upon acceptance of the Quote, the Contract shall be formed and become binding on both parties. Suppliers must not undertake work without written notification that they have been awarded a Contract and are required to start work.

Suppliers should note that the Authority reserves the right to terminate this procedure without any decision to award and will not be liable for any costs incurred by suppliers in developing their quote.

Suppliers should also note that, should they be successful the Authority reserves the right to terminate the Contract, if at any time it is discovered that the supplier made any material misrepresentation and/or have not notified to the Authority about any material changes in relation to the information provided in the Quote.



## Evaluation

This request for quote will be evaluated as follows.

|  |  |  |
| --- | --- | --- |
| **AWARD CRITERIA & WEIGHTINGS** | | |
| **Price** | 20% | **Total Price on the pricing schedule.** |
| **Quality** | 80% | Question 1 - 30%  Question 2 - 30%  Question 3 - 20% |

The quality questions that you are expected to respond to in your proposal are detailed in the table below:

|  |  |  |
| --- | --- | --- |
| **No** | **Question** | **Weighting** |
| 1 | **Methodology**  Please detail your proposed methodology for completing the work by the indicated deadlines (including key meetings and milestones). The response should address each of the evaluation criteria below individually.  ***Please limit your response to 4 sides of A4, Arial font size 11 for main body text***  Responses should:   * Demonstrate a clear understanding of the aims, objectives, and scope of study * Demonstrate an understanding of the Council’s specific local circumstances and background * Clearly define the project methodology and breakdown of approach to meet each of the key tasks outlined in the specification within set timescales. | 30% |
| 2 | **Experience and Expertise**  Please outline how the organisation and project team have the expertise and experience to meet the requirements set out in Section 1.  ***Please limit your response (excluding CV attachments – 1 page per CV) to 3 sides of A4, Arial font size 11 for main body text.***  The response should:   * Clearly demonstrate that the project team has direct expertise and experience in developing the case for heat network schemes * Clearly demonstrate that the project team has direct expertise and experience in feasibility assessments of shallow geothermal heat pump technology. * Provide robust, credible information demonstrating recent and relevant experience delivering at least 3 similar projects over the last 3 years to timescale, budget and Client requirements * Provide an organogram (or similar) which clearly outlines the roles of the project team, their relevant skills and their key tasks mapped against the key requirements for this study | 30% |
| 3 | **Project plan and management**  Please outline how the project will be managed effectively, including an indicative project plan/Gantt chart and accompanying narrative for completing the work by the deadline.  ***Please limit your response to 3 sides of A4, Arial font size 11 for main body text. This should include your project plan/Gantt chart.***  The response should:   * Clearly outline a project plan, including a breakdown of specific tasks, milestones and interdependencies for the successful delivery of the project. * Outline a resource schedule identifying staff time and budget allocation by key tasks. * Clearly outline the project management approach, including the approach to quality assurance. * Identify all relevant project risks, including an assessment of the risk impact and how the risks will be mitigated throughout the project. | 20% |

## Scoring Methodology

Where responses to questions are to be scored, the following scores are applied by a panel of evaluators to a Bidder’s submitted responses. The scores are awarded dependent on the level of evidence provided to each question.

A score of 3 (Satisfactory) represents an acceptable level of evidence and is the minimum acceptable score for any question. Providers who score less than a 3 in any one area will have their bid rejected.

**0** – No response and/or evidence is unacceptable or non-existent, or there is a failure to properly address any issue. The Authority does not have any confidence in the Bidder’s experience, capacity and ability to meet its requirements.

**1** – The response and/or the evidence are deficient (or not relevant) in the majority of areas and the Authority has a low level of confidence in the Bidder’s experience, capacity and capability to meet its requirements.

**2** – Large portions of the response are not satisfactory and/or are not supported by a satisfactory level of evidence and the Authority has limited confidence in the Bidder’s experience, capacity and capability to meet its requirements.

**3** – The response is satisfactory and supported by an acceptable standard of relevant evidence but with some reservations/issues not addressed. The Authority is satisfied with the Bidder’s experience, capacity and capability to meet its requirements.

**4** – The response is comprehensive and supported by a good standard of relevant evidence and provides the Authority with a good standard of confidence in the Bidder’s experience, capacity and capability to meet its requirements.

**5** – The standard of the response is very high, and the relevance of the response and the supporting evidence is very comprehensive and provides the Authority with a very high level of confidence in the Bidder’s experience, capacity and capability to meet the Authority’s requirements.

This contract is being awarded on Most Economically Advantageous Terms (MEAT) MEAT which is the combination of both the Quality and Cost scores. The highest scoring bidder will be recommended for the award of contract.

**Quality – % Total – High Best**

Quality Scores will be calculated using the following formula:

Your evaluated score (0-5) X question weighting

Sum total of your weighted score (out of 5)

Your weighted score X

Maximum score available (5)

**Price Evaluation – % Total - Low Best**

All price bids are compared against the lowest bid to reach the percentage difference from the lowest bid.

The lowest priced bid will receive 20%

Other Suppliers cost score will be calculated using the following formula:

Lowest Bid Price    X 20

Your Price

Your TOTAL SCORE will be calculated by adding your Quality + Cost weighted scores.

The most economically advantageous proposal will be determined by the evaluation with the highest TOTAL SCORE. This outcome will produce the preferred supplier.

## Contract Award

The approval of the award will be made by the appropriate Authority representative, who will also debrief all suppliers in writing.

# **APPENDIX 1: NON-COLLUSION CERTIFICATE**

I, the undersigned, in submitting the accompanying Quote to

(Name of Client)………………………………………………

………………………………………………………………………………………………

in relation to (details of Quote and reference)……………………………............

……………………………………………………………………………………………….

certify on behalf of (name of supplier)………………………………………………

that, with the exception of any information attached hereto (see \* below):

1) this Quote is made in good faith, and is intended to be genuinely competitive;

2) the amount of this Quote has been arrived at independently, and has not been fixed, adjusted or influenced by any agreement or arrangement with any other undertaking, and has not been communicated to any competitor;

3) we have not entered into any agreement or arrangement with any competitor or potential competitor in relation to this Quote;

4) I have read and I understand the contents of this Certificate, and I understand that knowingly making a false declaration on this form may result in legal action being taken against me.

In this certificate, the word ‘competitor’ includes any undertaking who has been requested to submit a Quote or who is qualified to submit a Quote in response to this request for Quote, and the words ‘any agreement or arrangement’ include any such transaction, whether or not legally binding, formal or informal, written or oral.

\* Information is/is not attached hereto (delete as appropriate)

SIGNED: ....................................................

FOR AND ON BEHALF OF:........................................

DATE:.........................................

1. [↑](#footnote-ref-2)