

23/01/2024

Dear Sir/Madam,

Invitation to Tender for the Closing the loop: Feasibility study to determine a feedback approach for post-consent monitoring to reduce consenting risk in future assessments project for the Carbon Trust's Offshore Renewables Joint Industry Programme for Offshore Wind (ORJIP Offshore Wind)

You are invited to submit a Tender for the Closing the loop: Feasibility study to determine a feedback approach for post-consent monitoring to reduce consenting risk in future assessments project (the "Closing the loop project" or "Project") which is part of the ORJIP Offshore Wind. The key objective of the Project is to develop an approach for feeding new knowledge from post-construction monitoring back into the pre-consenting assessment process to reduce uncertainty.

The Invitation to Tender (ITT) consists of the following documents:

- Description of Tender (this document);
- ORJIP Offshore Wind Stage II Contractors' Conditions;
- Tender Certificate (Word template);
- Bid Price Calculation Sheet (Excel template); and
- Clarification Document (if applicable¹).

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail addresses: ivan.savitsky@carbontrust.com and zilvinas.valantiejus@carbontrust.com.

Tenders must be submitted before 06/03/2024, 12:00 GMT. Any tenders received after this date and time will be deemed non-compliant.

Your Tender must consist of the following, the contents of which are described further below:

- Main Bid Document (pdf) – template not provided;
- Signed Tender Certificate (pdf) – template provided; and
- Bid Price Calculation Sheet (xls) – template provided.

The timeline of this procurement process is as follows:

Deadline for clarification questions	09/02/2024
Clarification Document published ¹	14/02/2024
Submission of full Tender	06/03/2024, 12:00 GMT
Bidder interviews	March 2024
Successful Contractor announcement	April 2024
Envisaged Contract award date	April 2024

¹ A Clarification Document will not be published if no clarification questions are received in relation to this ITT.



Please e-mail any clarification questions, including questions about the timing of this ITT, to ivan.savitsky@carbontrust.com and zilvinas.valantiejus@carbontrust.com any time before 09/02/2024. The complete set of clarification questions and all answers to clarification questions will be published in the Clarification Document on our website by 14/02/2024 and will hence be visible to all potential Bidders: <https://www.carbontrust.com/news-and-events/tenders>

For information about ORJIP Offshore Wind, please see the Carbon Trust's web site: <https://www.carbontrust.com/our-projects/offshore-renewables-joint-industry-programme-orjip-for-offshore-wind>

We look forward to receiving your Tender.

Yours sincerely,

.....
Ivan Savitsky
For and on behalf of **THE CARBON TRUST**



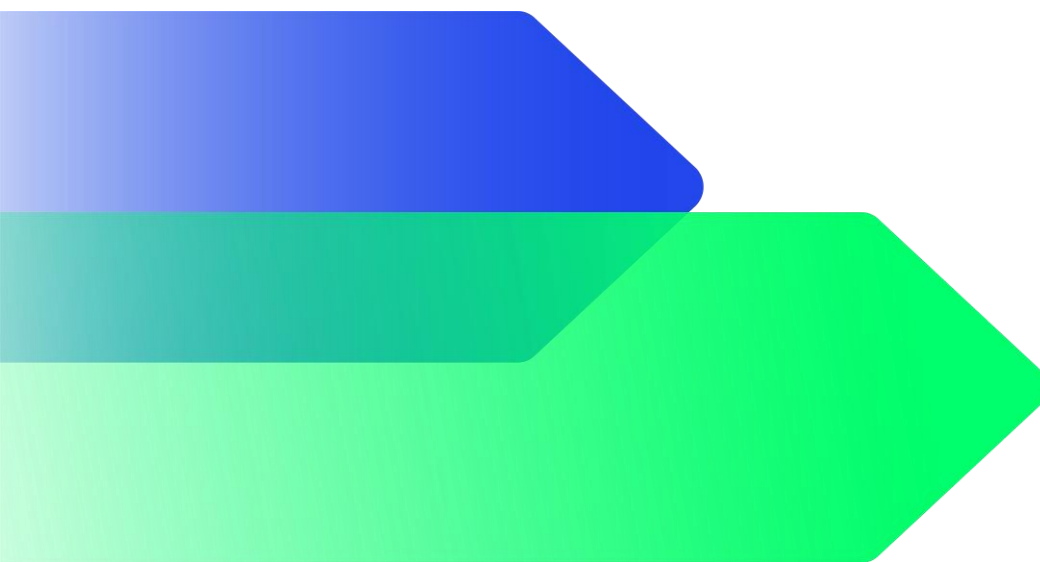
Offshore Renewables Joint Industry Programme for Offshore Wind



Invitation to Tender for the “Closing the loop: Feasibility study to determine a feedback approach for post-consent monitoring to reduce consenting risk in future assessments” Project

Description of Tender

January 2024



Contents

IMPORTANT INFORMATION FOR BIDDERS	3
1. Introduction to the Offshore Renewables Joint Industry Programme for Offshore Wind	5
2. Background and objective of the Closing the loop project	5
3. Tender documents for submission.....	6
4. Scope of Work	8
5. Intellectual Property and Knowledge	15
6. Bid Pricing.....	15
7. Tender Evaluation Criteria	16
8. Glossary	19

IMPORTANT INFORMATION FOR BIDDERS

Publishing

Neither this document, nor any part of it nor any other information supplied in connection with it may, except with the prior written consent of the Carbon Trust, be republished, reproduced, copied, distributed or disclosed to any person for any purpose other than consideration by the recipient of whether or not to submit a tender.

Tender evaluation

The received tenders will be evaluated by the Carbon Trust and the ORJIP Offshore Wind Partners and the project-specific Project Expert Panel (PEP) against the criteria provided in section 7. The Bidder authorises the Carbon Trust to share its submitted Tender for this purpose with the ORJIP Offshore Wind Partners and, without any supporting financial information (Financial Proposal incl. the Bid Price Calculation Sheet), the parties appointed to the PEP. A shortlist of Bidders will be created and invited for interview. Carbon Trust will conduct vetting of the shortlisted bidders. Carbon Trust may request shortlisted bidders to fill in a Due Diligence Questionnaire to supply additional information prior to being invited for an interview.

Contracting

Bidders should note that the Scope of Work contained in section 4 of this document does not constitute an offer to contract with the Carbon Trust. It only represents a definition of specific requirements and an invitation to submit a Tender addressing these requirements.

Issuance of this Invitation to Tender and the subsequent receipt and evaluation of the tenders by the Carbon Trust does not commit the Carbon Trust to enter into a Contract with any Bidder.

Should Your Tender be successful, a Final Scope of Work that builds upon the Scope of Work contained in section 4 of this document and Your Approach to Work will be mutually agreed between You and the Carbon Trust. Once the Final Scope of Work is agreed, Your offer will be formally accepted by the Carbon Trust issuing an Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing. The Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing will establish the Contract for the Closing the loop: Feasibility study to determine a feedback approach for post-consent monitoring to reduce consenting risk in future assessments project (the "**Contract**") between You and the Carbon Trust. With the exception of any minor amendments to the ORJIP Offshore Wind Stage II Contractors' Conditions which may be requested by the Bidder, the submission of a Tender shall constitute unqualified acceptance of the ORJIP Offshore Wind Stage II Contractors' Conditions. In the event that minor amendments to the ORJIP Offshore Wind Stage II Contractors' Conditions are requested, such amendments must be clearly stated and the exact alternative wording must be provided in Annex A of the Tender Certificate. Please note that it is at the sole discretion of the Carbon Trust to accept any of the proposed amendments and that the Carbon Trust reserves the right to require the provision of further information in relation to any such request. No minor changes other than those contained in Annex A of the Tender Certificate at the time of submitting the tender will be considered. No material changes will be considered at any time.

Mechanics of the Tender process

Bidders should note that:

- it is at the discretion of the Carbon Trust whether to accept any non-compliant Tender or whether to reject any non-compliant tenders without progressing such tenders through the evaluation phase;
- the Carbon Trust reserves the right not to accept the lowest priced Tender or any Tender whatsoever;
- the Carbon Trust reserves the right to accept more than one Tender;
- unless a Bidder makes a formal statement to the contrary, the Carbon Trust reserves the right to accept any part of a Bidder's Tender without accepting the remainder;
- formal notification that a tender has been successful will be communicated in writing by the Carbon Trust;
- the costs of tendering are the full responsibility of the Bidder; and
- the pricing set by Bidders shall be valid for a minimum of 90 days.

Bids may be submitted by individuals, companies, organisations or consortia.

Bidders should be aware that dates referred to in this Invitation to Tender may be subject to change where this is necessary in the interests of the Project (such changes will be notified in advance).

The Tender Certificate, Main Bid Document and any correspondence must be written in English. This Invitation to Tender, the Contract, its formation, interpretation and performance is subject to and in accordance with the law of England and Wales.

Conflicts of interest

Bidders should be free of any commercial interests, partnership arrangements or contracts underway or other matters which may present a conflict or potential conflict of interest in respect of the provision of these services. As set out in section 3, if a Bidder thinks that it may have any conflict or potential conflict of interest, the Bidder shall describe the details of this conflict and provide details of whether and how it would propose to manage such a conflict in a satisfactory and robust manner in Annex B of the Tender Certificate. The Carbon Trust reserves the right to require the provision of further information in relation to any conflict or potential conflict of interest.

Disclaimer

The information contained in this Description of Tender document and in any documents or information it refers to or incorporates (the "**Disclosed Information**") has been prepared to assist interested parties in deciding whether to submit a Tender. The Disclosed Information is not a recommendation by the Carbon Trust. It does not purport to be all inclusive or include all the information that a Bidder may require.

Neither the Carbon Trust nor any of its directors, employees, agents or advisers makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the Disclosed Information. All such persons or entities expressly disclaim any and all liability (other than in respect of fraudulent misrepresentation) based on or relating to the Disclosed Information or any subsequent communication. The Bidder should conduct its own due diligence and seek its own professional, legal, financial and other advice as appropriate. The only information which will have any legal effect and/or upon which any person may rely will be such information (if any) as has been specifically and expressly represented and/or warranted in writing to the successful Bidder in any written contract that may be entered into with the Carbon Trust.

1. Introduction to the Offshore Renewables Joint Industry Programme for Offshore Wind

- 1.1. The Offshore Renewables Joint Industry Programme for Offshore Wind (“ORJIP Offshore Wind”) is a collaborative R&D programme between the Carbon Trust, EDF Energy Renewables Limited, Ocean Winds UK Limited, Equinor ASA, Orsted Power (UK) Limited, RWE Offshore Wind GmbH, Shell Global Solutions International B.V, SSE Renewables Developments UK Limited, TotalEnergies OneTech, Crown Estate Scotland, The Scottish Ministers and The Crown Estate Commissioners (the latter 11 collectively referred to in this document as “**ORJIP Offshore Wind Partners**”).
- 1.2. The objective of ORJIP Offshore Wind is to improve the evidence base in respect of the overall impact that offshore wind projects have on the marine environment and with regard to other uses of marine areas as well as better inform consenting authorities, offshore wind farm developers and other relevant stakeholders on the environmental risk that is associated with planned and existing offshore wind projects.
- 1.3. To achieve this objective, ORJIP Offshore Wind provides a framework to identify, develop, initiate and conduct impactful, relevant and strategic research and development projects aimed at reducing consenting risk, project maturation time, cost, and the environmental impact of offshore wind projects. Research is undertaken under areas that are chosen as priority focus areas for ORJIP Offshore Wind each year of the programme.
- 1.4. Contractors receive technical direction and data from ORJIP Offshore Wind Partners through the Carbon Trust management team and in collaboration with the parties in the Project Expert Panel.
- 1.5. This project will fall under the “Cumulative impact assessment” priority focus area.
- 1.6. Please note, the term “Contractor”, where used within this document, refers only to the successful Bidder or, in the event that the Contract is awarded to a consortium, the successful Bidders.

2. Background and objective of the Closing the loop project

- 2.1. The ORJIP Offshore Wind Steering Group would like to develop an approach for ‘closing the loop’ between pre- and post-construction data collection, defining monitoring methods and modelling approaches to refining estimates for realised OWF effects post-construction. Working collaboratively across scientists and regulators, the project will define an approach to feed this new knowledge back into the pre-consenting assessment process to reduce uncertainty.
- 2.2. Post-construction data collection and monitoring for several species has been implemented as a requirement for offshore wind farm consent approvals. As a result, the amount of post-consent monitoring data collected is expected to increase over the coming years. However, there is no strategic feedback approach to use this data in cumulative assessments. The introduction of an agreed approach whereby empirical post-construction data can be used to quantify realised effects to populations from offshore wind farms could enable this data to be used in cumulative assessments. At

present, this opportunity to reduce uncertainty in cumulative assessments is being missed.

2.3. The project aims to deliver:

- 1) Recommendations for a strategic approach to allow post-consent monitoring to be incorporated into the assessment process;
- 2) Reduction in consenting risk and uncertainty, with empirical data to properly parameterise cumulative impact assessments;
- 3) An approach that has been developed in engagement with UK regulators, SNCBs, and other stakeholders in such a way that the recommended approach can feasibly be adopted by them.

2.4. The objectives of the project are to feed new knowledge from post-construction monitoring back into the pre-consenting assessment process to reduce uncertainty, for two key purposes:

- 1) To allow post-consent monitoring to be incorporated into the assessment process (e.g., to inform modelling), and
- 2) To provide empirical data to inform actual observed effects of a wind farm to inform cumulative impact assessments.

2.5. Consideration of the practical implementation of models and guidance produce will be paramount to the success of the study, and bidders should consider this during the proposal stage and demonstrate how this will be included in delivery.

3. Tender documents for submission

3.1. In response to this Invitation to Tender, Bidders are required to submit

- i. A Main Bid Document (pdf) – no template provided but contractors are requested to split the document between the Technical Proposal and the Financial Proposal;
- ii. The signed Tender Certificate (pdf) – template provided; and
- iii. The filled-in Bid Price Calculation Sheet (xls) – template provided.

3.2. The Main Bid Document should be no more than 20 pages excluding appendices and no more than 40 pages including appendices. Font should be clearly legible, and be at least font size 11. The Main Bid Document shall as a minimum include the following information:

Technical Proposal:

- i. The Bidder's proposed detailed Approach to Work (see section 4 and criterion 1 for more details). Bidders shall provide Work Package descriptions in the format

set out at the end of section 4 in this document. The Approach to Work shall be split into a Technical Proposal and a Financial Proposal:

- include a Gantt chart which describes the timeline for the Project, showing when each Work Package will start and finish;
 - outline how the Bidder will deliver the Scope of Work and do so on budget and within the allocated time;
 - specify any input data, background IP, hardware or other inputs that the Bidder requires the Carbon Trust and/or the ORJIP Offshore Wind Partners to provide;
 - specify any Alternative Work (i.e. substitute activities to take place instead of certain activities outlined in the Scope of Work in section 4), but without any supporting financial information. If Alternative Work forms part of the Approach to Work, the Bidder is expected to highlight, explain and justify the intended deviation from the Scope of Work. Alternative Work will be considered as non-optional when the Tender is evaluated; and
 - specify any Additional Work (i.e. activities to take place in addition to the activities outlined in the Scope of Work in section 4), but without any supporting financial information. If Additional Work forms part of the Approach to Work, the Bidder is expected to explain and justify why the Additional Work would be beneficial and to provide a separate quotation for these activities. It is at the discretion of the Carbon Trust to consider Additional Work in the evaluation of the Tender.
- ii. an explanation of experience and staff skills, and how these are relevant to the Approach to Work – see criteria 2 and 3 for more details; and
- iii. supplementary information to provide experience evidence and skills evidence (e.g. CVs) – see criteria 2 and 3 for more details. This information should be provided as appendices to the Main Bid Document.

Financial Proposal:

- i. a pdf copy of the filled-in Bid Price Calculation Sheet;
 - ii. the offered Bid Price, including any cost assumptions deemed relevant by the Bidder – see section 6 and criterion 4 for more details;
 - iii. the price for any Additional Work proposed by the Bidder; and
 - iv. a Work Package specific breakdown of the costs per sub-contractor (if any).
- 3.3. The Tender Certificate must be signed by an authorised signatory. Bidders must fill in the provided template.
- 3.4. The filled-in Bid Price Calculation Sheet must be provided in Excel format in addition to the information provided in the Main Bid Document. See section 6 and criterion 4 for more details.
- 3.5. The failure by a bidder to submit either the Main Bid Document, the signed Tender Certificate or the filled-in Bid Price Calculation Sheet shall mean that such Tender is a non-compliant Tender.

4. Scope of Work

- 4.1. The Scope of Work is provided at the end of this section 4.
- 4.2. The Scope of Work comprises 5 Work Packages. The Scope of Work sets out the initial ideas on the key activities that the Contractor is expected to deliver for the Project.
- 4.3. It is expected that the Contractor will report on Project Deliverables to the ORJIP Offshore Wind Steering Group and the PEP. The Carbon Trust, ORJIP Offshore Wind Steering Group and the PEP shall review and provide feedback on each Project Deliverable. There will be at least one round of review comments to be accommodated by the Contractor for each Project Deliverable.
- 4.4. The Final Scope of Work will be agreed between the Carbon Trust and the Contractor when entering into the Contract. The Final Scope of Work may reflect any updates, changes or improvements to the Scope of Work as proposed by the Contractor in its Alternative Work or Additional Work and as agreed by the Carbon Trust.
- 4.5. Due to the breadth of skills and experience required for the Project, bidders may decide to build a consortium to successfully meet the objectives of the Project. If a Tender is submitted by a consortium it is expected that, in the case that the consortium is selected as the preferred Bidder, Carbon Trust will only enter into a Contract with the Project Coordinator, and that the Project Coordinator will subcontract the other members of the consortium.
- 4.6. The Carbon Trust appreciates that it will take a small team of mixed seniority approximately 6-9 months to complete the Project.
- 4.7. Bidders should use the Scope of Work as set out below to create the Approach to Work. Any Alternative Work or Additional Work shall be stated in the Approach to Work at the end of the relevant Work Package description.
- 4.8. It is expected that simplifying assumptions will be required to complete the work in the given timeframe. These assumptions should, to the extent possible at the time of Tender submission, be clearly stated in the Approach to Work. It is expected that during the

execution of the Closing the loop Project, any assumptions will be discussed with the ORJIP Offshore Wind Steering Group and the PEP prior to the start of each Work Package.

- 4.9. The Scope of Work includes one Optional Work Package (WP4). The ORJIP Steering Group will take a decision during delivery as to whether the delivery of this work package is required. The Bidder's Approach to Work should address this Optional Work Package, but it should be kept and highlighted as optional in the Bidder's Approach to Work.

WORK PACKAGES

Work package	Description of work
WP1 Development of approach	<p>Goal</p> <p>Develop recommendations on a strategic approach for management and use of post-consent monitoring data to close the loop in the assessment process and reduce consenting risk in future assessments.</p> <p>Activity</p> <p>The Contractor should review current processes for how offshore wind post-consent monitoring data is used to inform consent decisions and cumulative impact assessments. This review should consider the English, Welsh, and Scottish processes to ensure that recommendations made are realistic and feasible given current uses. The review should also consider processes used in other offshore wind markets and other industries, where there may be useful learnings.</p> <p>In the approach development, it will be important for the Contractor to include learnings from relevant ongoing work, avoiding any potential duplication.</p> <p>The Contractor should undertake a desktop study to develop recommendations on a strategic approach for closing the loop in the assessment process focusing on six key aspects:</p> <ol style="list-style-type: none">a) Policy and processb) Data availabilityc) Modelling approachesd) Tools developmente) Cumulative assessment, including steps related to the Cumulative Effects Frameworkf) Future post-consent monitoring requirements <p>In order to develop the recommendations, the Contractor will need to engage with relevant UK regulators and statutory nature conservation bodies (SNCBs) to understand the feasibility of adoption of recommendations and to tailor recommendations to those that will have the greatest impact and likelihood of adoption.</p> <p>The intention of this study is to provide recommendations that are at least UK-wide, and the Contractor should determine how differences in regulatory approaches of devolved administrations will affect this. The Contractor should consider a process that is able to utilise data from outside the UK if appropriate.</p> <p>The process should consider multiple uses of the data, including:</p>

- Use of data and analysis to inform modelling for future wind farm consent decisions; and
- Use of data to inform the observed effects of the wind farm that has collected data, to inform cumulative assessments.

Case study: Whilst the objective of this study is not purely to analyse existing post-consent monitoring data, it is expected that taking a receptor group, e.g., seabirds, through the process may illustrate challenges and opportunities for future processes. This approach may also demonstrate any need of treating individual species differently, e.g., (i) seabirds affected by collision, and (ii) seabirds affected sub-lethally such as via displacement of barrier effects.

Bidders should outline how they will proceed with this case study, including identifying potential receptor groups (although this can be confirmed during project delivery).

WP1 Deliverables:

D01: Report outlining approach developed, and results of case study

D02: Presentation to ORJIP OSW Steering Group and Project Expert Panel

WP2

Stakeholder workshop(s)

Goal

Provide insight into and obtain stakeholder feedback about the proposed approach from WP1. Ensure that approach has been developed in engagement with UK regulators, SNCBs, and other stakeholders in such a way that the recommended approach can feasibly be adopted by them.

Activity

Conduct a workshop, or series of workshops, to provide insight into how such an approach could be defined and where current evidence gaps are for the six aspects considered in WP1:

- Policy and process
- Data availability
- Modelling approaches
- Tools development
- Cumulative assessment, including steps related to the Cumulative Effects Framework
- Future post-consent monitoring requirements

Bidders should outline their approach to conducting workshops, including number of workshops, specific workshop objectives, expected invitees, workshop structure, and roles. Where appropriate, refine approach based on outcomes of workshops, if appropriate, refine and update WP1 report with final approach.

WP2 Deliverables:

D03: Delivery of workshops

D04: Summary report of workshop outcomes and refined approach

WP3

Recommendations report

Goal

Consolidate learnings from WP1 and WP2 to provide final recommendations on the approach.

Activity

Consider feedback from earlier WPs to deliver a report setting out how post-consent monitoring could be incorporated into a holistic assessment process, producing recommendations on a strategic framework for a feedback cycle to lower consenting risk and reduce uncertainty.

A priority outcome is to include a clear recommendation on how to ensure data is available in the format that is required in order to be taken through the process that has been defined by the Contractor.

Provide recommendations including roles and responsibilities for key stakeholder groups including:

- Offshore wind farm developers
- Environmental impact assessment practitioners
- Post-consent monitoring contractors
- SNCBs
- Regulators

The Contractor should outline an approach towards achieving acceptance of the study findings, in order that recommendations can be implemented for project assessments in the near-term.

WP3 Deliverables:

D05: Recommendations report

D06: Presentation to ORJIP OSW Steering Group and Project Expert Panel

WP4

Expand into second receptor group (Optional Work Package)

Goal

Take a second receptor group through the recommended approach to demonstrate its effectiveness across multiple receptor groups. Update approach as required to enable multiple receptor groups to be accommodated.

Activity

	<p>Implement approach for second receptor group (to be recommended by the Contractor and agreed in discussion with the ORJIP Steering Group and Project Expert Panel).</p> <p><i>*This is an Optional Work Package. The ORJIP Steering Group will take a decision during delivery as to whether the delivery of this work package is required. Bidders should include a costed approach to delivering this work package as part of the proposal.</i></p>
<p>WP4 Deliverables</p> <p>D07: Summary report outlining results of second receptor group, and any recommended updates to approach.</p> <p>D08: Presentation to ORJIP OSW Steering Group and Project Expert Panel</p>	
<p>WP5</p> <p>Project validation</p>	<p>Goal</p> <p>To provide a third-party review of the project deliverables to assess its accuracy and identify any shortfalls to progress the final report as a scientific publication.</p> <p>Activity</p> <p>Conduct peer review, potentially including:</p> <ul style="list-style-type: none"> a) An independent review of project and outputs. b) Publication of scientific report. <p>Proposals should set out the intended approach to peer review, including details such as the proposed publication.</p> <p>If it is deemed appropriate, this will include preparing documents for publication, including the final grammatical proofreading of documents for publication.</p>
<p>WP5 Deliverables:</p> <p>D09: Project validation report</p> <p>D10: Summary document(s) prepared for publication</p>	
<p>WPA</p> <p>Project Management</p>	<p>The contractor should stipulate how they will manage the project efficiently and effectively. This should include specific costs for project management time, including update calls with the Carbon Trust Project Manager and/or ORJIP OSW Steering Group as required.</p> <p>This should also include production of a brief executive summary for the whole project, for internal dissemination.</p> <p>The budget should also accommodate the production of a final presentation and time dedicated to presenting this in the form of a webinar</p>

to invitees from the participants of ORJIP OSW including the Advisory Network.

Finally, if appropriate, resource should also be allocated to provide inputs into the 'ORJIP Risk Model'. The contractor is expected to produce a risk register and provide guidance on the effect of the research on inputs to the 'ORJIP Risk Model'.

WPA Deliverables:

D11: Project executive summary

D12: Delivery of webinar

D13: Project Risk Register inputs

Relevant literature

Bidders do not need to utilise these literature sources, but they have been identified as relevant to the project and may be of use for proposals or project delivery.

- 1) JNCC, Feasibility study for meta-analysis of red-throater diver displacement, 2017 - [link](#).
- 2) Renewables Grid Initiative, A review of biodiversity data needs and monitoring protocols for the Offshore Wind Energy Sector in the Baltic Sea and North Sea, 2021 - [link](#).
- 3) MMO, Review of environmental data associated with post-consent monitoring of licence conditions of offshore wind farms, 2014 - [link](#).
- 4) Activities being undertaken by the Pathways to Growth workstream – [link](#).
- 5) The Crown Estate, OWEKH, [link](#).

5. Intellectual Property and Knowledge

- 5.1. Full details of the intellectual property requirements and conditions can be found in the attached ORJIP Offshore Wind Stage II Contractors' Conditions.
- 5.2. The Carbon Trust and/or the ORJIP Offshore Wind Partners are able to make available the following input data, background IP or other resources to the successful Bidder for the purposes of the completing the Project, subject to the confidentiality conditions in the ORJIP Offshore Wind Stage II Contractors' Conditions:
 - i) None.

6. Bid Pricing

- 6.1. To provide Bidders with greater clarity on the nature, level and type of work involved in the various Work Packages, the Total Budget for the delivery of this Project is expected to be a maximum of **£100,000, inclusive of optional WP4**. If the proposed budget exceeds this value, a clear explanation should be included in the proposal.
- 6.2. The Bid Price submitted with the Tender must be derived from the cost breakdown in the Bid Price Calculation Sheet, and must include all expenses. The Bid Price is the price for the activities that will address the Scope of Work (and any Alternative Work proposed by the Bidder). The Bid Price Calculation Sheet and the Bid Price shall not include the price of any Additional Work suggested by the Bidder. Instead, the price for such Additional Work Packages shall be stated separately to the Bid Price in the Main Bid Document.
- 6.3. If the Bid Price exceeds the expected range of the Total Budget as stated under section 6.1, to avoid receiving a lower score for criterion 4, in the Main Bid Document the Bidder should provide a clear and justified reason why the Bid Price exceeds the expected budget.
- 6.4. All costs and rates quoted in the Main Bid Document and Bid Price Calculation Sheet must be in GBP (£) and all staff rates quoted in the Tender must represent the **Day Rate** for employment of staff members.
- 6.5. Any expenses that the Bidder expects to incur throughout the project must be separately included as a capped amount under Expenses. Expenses will be paid as incurred and any unused balance will not be paid.

7. Tender Evaluation Criteria

Bidders should take the following evaluation criteria into account when preparing and submitting their tenders. In the event of equivalent scores of two or more received Tenders, suppliers and sub-contractors who have committed to decarbonisation targets (see end of this section) will be preferred.

CRITERION 1: APPROACH TO WORK (WEIGHTING: 35%)

<i>Description</i>	<i>Information required from Bidders</i>
Proposed Approach	<p>In the Main Bid Document, Bidders are required to provide a clear and detailed description on how they plan to deliver the work for this Project.</p> <p>The description should include an initial overview on the approach followed by a description on how each Work Package and task will be delivered.</p> <p>Also, Bidders need to justify how their proposed approach meets the objectives of the Project.</p>
Additional Work	<p>If there is any Additional Work proposed by the Bidder, these aspects will be evaluated separately. The suggestion of Additional Work by the Bidder will not have a negative impact on the evaluation of the Tender.</p>
Project management	<p>Bidders are required to describe how they will manage the Project utilising appropriate resources and describe how they will work with the various stakeholders, such as the relevant PEP, to get information and manage potentially conflicting relationships.</p>

CRITERION 2: EXPERIENCE (WEIGHTING: 20%)

<i>Description</i>	<i>Information required from Bidders</i>
Desired experience	<p>In the Main Bid Document, Bidders should elaborate on skills and experience listed below and explain how these past experiences are relevant for this Tender. Of particular importance will be the Bidder's understanding of the policy environment and the need for this project.</p> <p>In addition, Bidders should provide at least two examples (with reference to specific roles, responsibilities and activities the Bidder undertook) of previous work which illustrates the Bidder's skills, capabilities, and experience in all of these areas (Bidders may wish to make reference to submitted examples of previous work for other clients).</p> <p>Bidders are advised that experience is considered a key criterion, and partnerships with other companies to support certain areas of experience are welcomed. All experience / case studies should be attached as an appendix to the Main Bid Document.</p> <p>Bidders should provide evidence of their relevant skills and experience. It is anticipated that the successful bidder will exhibit, among others, the following range of skills and experience:</p>

	<ul style="list-style-type: none"> • Understanding of the requirements under EU and UK legislation; • Practical understanding of the offshore wind industry, including consenting/licensing processes and operation of offshore wind farms; • Understanding of types of post-construction data collected and how this could be used to inform future consent decisions; • Biological understanding of selected receptor group; • A track record of satisfactory health, safety and quality management; • Experience of undertaking authoritative studies in relevant applied science areas; • Experience of reporting and presenting the results of studies in relevant applied science areas; • Experience of working collaboratively with regulatory bodies and industry, ideally including the renewables industry and Statutory Nature Conservation Bodies.
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CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)

<i>Description</i>	<i>Information required from Bidders</i>
CVs/Resumes	Bidders are required to provide detailed CVs/Resumes for any key personnel who will be involved with this Contract together with proposed Project structure, intended position of the key personnel in the Project, and main responsibilities. CVs should include professional memberships of proposed staff working on this Project.
Applicable skills	Bidders should elaborate on the most relevant skills of the key personnel that will be involved in the Project.
Prior experience form involved staff	Please include examples of similar work performed by the proposed staff members, explaining how is relevant to the Approach to Work.
Expert engagement	A close working relationship with key stakeholders, such as government departments & agencies, regulatory bodies, statutory nature conservation bodies (SNCBs), non-governmental organisations (NGOs) and academia, who are seen relevant to the success of this Project. Please supply ideas of how these groups can be engaged and leveraged.

CRITERION 4: DATA ACQUISITION (WEIGHTING: 10%)

<i>Description</i>	<i>Information required from Bidders</i>
Knowledge and experience of relevant source data	It is understood Bidders may not be able to commit to access or use of 3 rd party data without permission from the owner. A key criterion for scoring is that Bidders have a good understanding of what source data is likely to be available and who the owners are. Permission to

	use the data can be determined attained through coordination with ORJIP Offshore Wind.
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CRITERION 5: BID PRICE (WEIGHTING: 20%)

<i>Description</i>	<i>Information required from Bidders</i>
Day rates and man hours (man-h) for all staff grades	In the Bid Price Calculation Sheet, Bidders are required to provide day rates for all staff grades and to input the man-h involved in each Work Package.
Price for the delivery of the Project	<p>In the Bid Price Calculation Sheet, Bidders are required to provide a cost breakdown by Work Package, including man hours and day rates of personnel completing the work as specified in section 5.</p> <p>Bidders are required to specify expected expenses separate from the estimated budget for each Work Package.</p> <p>The Bid Price will be assessed on the price for the Approach to Work (which includes the price of the Work Packages in the Scope of Work and any Alternative Work proposed by the Bidder).</p> <p>If there is any Additional Work proposed by the Bidder, this will be evaluated separately. The suggestion of Additional Work by the Bidder will not have a negative impact on the evaluation of the Tender.</p> <p>Carbon Trust will reimburse reasonable expenses at cost and receipts may be requested. Pre-approval will be required for travel costs over £150 per return journey and combined hotels & subsistence cost exceeding £200 per day.</p> <p>Bidders will be required to confirm or comment on their ability to carry out the activities detailed in the Scope of Work within the initial term of the Contract and provide an outline plan of work.</p>

The Carbon Trust has committed to reaching Net Zero by 2050. Our associated targets have been validated by the Science Based Targets Initiative (SBTi)¹. To meet the initial targets that we have set for ourselves, we encourage all our suppliers and sub-contractors to themselves have equivalent plans in place by 2026 at the latest. Measuring your emissions, setting targets, and encouraging others to do so will help push the needle on decarbonisation together.

Accordingly, we have included climate change commitment clauses in the ORJIP Stage II Contractors' Conditions. Bidders may submit Tenders even if they cannot meet the defined conditions now, but if this is the case this should be clearly flagged in the Tender Certificate as a requested change to the ORJIP Stage II Contractors' Conditions. Please reach out if you need more information on this.

¹ <https://sciencebasedtargets.org/>

8. Glossary

Approach to Work	Has the meaning given to it in section 3.1.
Additional Work	Any activities that are proposed by the Bidder in addition to those in the Scope of Work. It is at the discretion of the Carbon Trust to consider Additional Work in the evaluation of the Tender. The suggestion of Additional Work by the Bidder will not have a negative impact on the evaluation of the Tender.
Alternative Work	Deviations from the Scope of Work that are proposed by the Bidder, which replace work or tasks in the Scope of Work. Alternative Work will be treated as non-optional in the evaluation of the Tender.
Award Letter	A letter, issued by Carbon Trust, informing the Contractor about the award of the Contract. The Award Letter is issued together with the Final Scope of Work and the ORJIP Offshore Wind Stage II Contractors' Conditions.
Bidder	An individual, a company, an organisation or a consortium submitting a bid for the Project.
Bid Price	Has the meaning given to it in section 6.2. The total price for the Bidder to complete the Project in line with the Approach to Work. In the Tender, the Bid Price shall include the price for the delivery of all Work Packages described in the Scope of Work and any Alternative Work proposed by the Bidder. If any Additional Work is suggested by the Bidder, the price for the Additional Work shall be stated separate to the Bid Price.
Bid Price Calculation Sheet	An Excel template provided by the Carbon Trust that is to be provided by the Bidder in addition to the Main Bid Document.
Carbon Trust Project Manager	The Carbon Trust employee who serves as first point of contact in relation to this ITT and the Project.
Clarification Document	A document containing all received clarification questions and Carbon Trust's responses to these questions.
Contract	A document consisting of the Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing.
Contractor	The Bidder (or in the case of a consortium, Bidders) selected for the delivery of the Project.
Description of Tender	This document.
Due Diligence Questionnaire	A questionnaire that is to be completed by shortlisted Bidders should Carbon Trust's bidders vetting process give reason to

	conduct a due diligence. In case of a consortium, the Due Diligence Questionnaire is to be filled-in by the designated Project Coordinator.
Executive Summary Report	A 3-10 pages report containing a high-level description of the Work Programme and a summary of the relevant results, findings and conclusions of the Project.
Final Scope of Work	The agreed Work Programme for the Project, based on the Scope of Work and the Approach to Work, which is mutually agreed between the Carbon Trust and the Contractor.
Financial Proposal	Any financial information provided as part of the Tender, including the Bid Price and the Bid Price Calculation Sheet.
Flash Report	A template provided by the Carbon Trust at Project start.
Invitation to Tender (ITT)	The following group of documents: Description of Tender (this document); ORJIP Offshore Wind Stage II Contractors' Conditions; Tender Certificate template; Bid Price Calculation Sheet template; and Clarification Document (if applicable ²).
Main Bid Document	Has the meaning given to it in sections 3.1 and 3.2. No template is provided.
Project	The Closing the loop: Feasibility study to determine a feedback approach for post-consent monitoring to reduce consenting risk in future assessments or Closing the loop project.
Project Closeout Form	A template provided by the Carbon Trust towards the end of the Project.
Project Deliverables	The individual deliverables including, but not limited to, any reports, technical notes, documents, drawings, models, data, webinars to be produced by the Contractor according to the Scope of Work (see section 4) or as otherwise agreed in the Final Scope of Work.
ORJIP Offshore Wind	Offshore Renewables Joint Industry Programme for Offshore Wind
ORJIP Offshore Wind Partners	A group of leading offshore wind farm developers and public sector non-developers supporting ORJIP Offshore Wind.
ORJIP Offshore Wind Advisory Network	A network of stakeholders that voluntarily advise ORJIP offshore wind on the selection, implementation and delivery of ORJIP Offshore Wind projects.

ORJIP Offshore Wind Risk Model	The Contractor is not expected to produce a risk model of its own, but rather provide an estimate, with appropriate explanation, for potential risk reduction implications of the research undertaken within the frame of the delivered project. The Carbon Trust will provide a template to assist the Contractor in this process.
ORJIP Offshore Wind Risk Model Input Sheet	A form (to be provided by Carbon Trust) which the Contractor should complete in WPA to provide input into the ORJIP Offshore Wind Risk Model.
ORJIP Offshore Wind Steering Group	The Steering Group represents each of the ORJIP Offshore Wind partners and is the decision-making authority for ORJIP Offshore Wind projects.
Project Expert Panel or "PEP"	A group consisting of technical experts from the ORJIP Offshore Wind Advisory Network and ORJIP Offshore Wind Partners appointed by the ORJIP Offshore Wind Partners. The PEP will supervise the Project and where necessary make recommendation to the ORJIP Offshore Wind Steering Group.
Scope of Work	The (preliminary) Work Programme for the Project as defined in section 4 of this document. At Contract award, the Scope of Work will be replaced by the Final Scope of Work.
Technical Proposal	All parts of the Main Bid Document excluding the Financial Proposal.
Tender	Bidder's response to this ITT consisting of the following elements: <ul style="list-style-type: none"> - Main Bid Document (proposal); - signed Tender Certificate; and - Bid Price Calculation Sheet
Tender Certificate	A declaration that is to be provided by the Bidder (in case of a consortium: by the designated Project Coordinator) in addition to the Main Bid Document.
Total Budget	The expected amount of money available that will be made available from ORJIP Offshore Wind to the Contractor for the delivery the Project.
Work Package	A group of related tasks to be delivered under the Project.
Work Programme	The entirety of all Work Packages.