

28 February 2024

Dear Sir/Madam,

**Invitation to Tender for the Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase project for the Floating Wind Joint Industry Programme**

You are invited to submit a proposal for the Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase project which is part of the Floating Wind Joint Industry Programme. The key objective of this project is to build upon previous studies to further understand current in-situ major component replacement technologies .

Please be aware that this process is a non-mandatory procurement process, published for transparency and best practice. All timescales are based, as near as possible, to the Open Procedure. However, dates referred to below may be subject to change where this is necessary in the interests of the project (such changes will be notified in advance).

Should your proposal be successful an Award Letter, the Scope of Work, the Carbon Trust Conditions of Contract ("Conditions"), and any clarifications agreed in writing, will establish the Contract for the Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase project (the "Contract") between you and the Carbon Trust. The Conditions accompany this ITT for your prior review. Please note that in the interests of transparency and fairness, these Conditions are non-negotiable, although we will provide clarifications to any queries you may have prior to submitting your Tender, answers to which will be distributed to all bidders as set out below. Bids that fail to accept the Conditions in their full un-amended form (other than changes explicitly accepted and agreed by the Carbon Trust on the clarifications page) at the time of submission will be considered to be non-compliant and may, at the Carbon Trust's discretion, be excluded from the procurement process.

Clarification questions must be emailed to [Alistair.Morris@carbontrust.com](mailto:Alistair.Morris@carbontrust.com) and [FloatingWind@carbontrust.com](mailto:FloatingWind@carbontrust.com) any time before 13 March 2024. Answers to clarification questions will be communicated by email by 18 March 2024. Answers can be found at: <https://www.carbontrust.com/about-us/tenders>.

Unless informed to the contrary, Tenders and communications should be sent by e-mail to the following e-mail address: [Alistair.Morris@carbontrust.com](mailto:Alistair.Morris@carbontrust.com) and [FloatingWind@carbontrust.com](mailto:FloatingWind@carbontrust.com).

Please submit your proposal by 17:00 BST 10 April 2024.

The timeline of this procurement process is as follows:

Deadline for clarification questions	13 March 2024
Clarification response date	18 March 2024
Submission of full proposal	17:00 BST 10 April 2024
Bidder interviews	Week commencing 27 May 2024
Project kick off	July 2024

If you have any questions about the timing, please let us know.

We look forward to receiving your Tender.

Yours sincerely,

**Alistair Morris**  
For and on behalf of  
THE CARBON TRUST

## 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 published, 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 Floating Wind JIP Partners against the criteria provided in section 7 and the Bidder authorises the Carbon Trust to share its submitted Tender with the Floating Wind JIP Partners for this purpose. A shortlist of Bidders will be created and invited for interview. Carbon Trust will do a 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 described in this Invitation to Tender (ITT) 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 proposal addressing these requirements.

Issuance of this ITT 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 Floating Wind JIP Stage III Contractors' Conditions, and any clarifications agreed in writing. The Award Letter, the Final Scope of Work, the Floating Wind JIP Stage III Contractors' Conditions, and any clarifications agreed in writing will establish the Contract for the Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase project (the "**Contract**") between You and the Carbon Trust. With the exception of any minor amendments to the Floating Wind JIP Stage III Contractors' Conditions which may be requested by the Bidder, the submission of a Tender shall constitute unqualified acceptance of the Floating Wind JIP Stage III Contractors' Conditions. In the event that minor amendments to the Floating Wind JIP Stage III 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 also 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.

# Floating Wind Joint Industry Programme

## Invitation to Tender for the “Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase” Project

### Description of Tender

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# 1. Introduction to the Floating Wind Joint Industry Programme

- 1.1. The Floating Wind Joint Industry Programme ("Floating Wind JIP") is a collaborative R&D initiative between the Carbon Trust and participating industry partners bp, EDF Renouvelables, EnBW, Equinor, Kyuden Mirai Energy, Ocean Winds, Ørsted, Parkwind, RWE Offshore Wind, ScottishPower Renewables, Shell, Skyborn Renewables, SSE Renewables, TEPCO, Tohoku EPCO, TotalEnergies and Vattenfall (the latter are collectively referred to in this document as "**Floating Wind JIP Partners**"), that aims to investigate the challenge and opportunities of developing commercial-scale floating wind farms.



- 1.2. The objective of the Floating Wind JIP is to overcome technological challenges and advance commercialisation of floating offshore wind.
- 1.3. Contractors receive technical direction and data from Floating Wind JIP Partners through the Carbon Trust management team.
- 1.4. Please note, the term "Contractor", where used within this document, refers only to successful bidders.

## 2. Background and objective of the OMCR project

- 2.1. The Floating Wind JIP Partners would like to further investigate the status of current in-situ major component replacement technologies available and evaluate their suitability as well as developing criteria to be used subsequently as part of a follow-on Beta Phase.
- 2.2. There are two main solutions for the Major Component Replacement (MCR) of floating wind turbines, tow-to-port (TTP) and onsite MCR. Previous projects undertaken by the Floating Wind JIP:
  - Tow-to-Port Maintenance project (TTP) – which assessed strategies and methods for carrying out tow-to-port operations for a floating wind farm.
  - Heavy Lift Offshore Maintenance project (HLM) – which assessed strategies and methods for carrying out heavy lift offshore operations on site at a floating wind farm.
  - Major Component Exchange with Self-Hoisting Cranes (SHC) – which evaluated different technology options surrounding major component exchange, specifically self-hoisting cranes and climbing cranes on site.

Have demonstrated that onsite MCR can be more cost optimal compared to TTP for commercial scale floating offshore wind. The current feasibility of onsite MCR is however limited due to applicable innovations having a low Technology Readiness Level (TRL). One the main factors for this low TRL is a lack of applicability criteria and a framework for the basis of design, testing, manufacturing, and offshore deployment of these technologies.

It is anticipated that the Onsite Major Component Replacement Assessment project will be divided into two phases, an Alpha Phase which will build upon previous related projects to evaluate current MCR technology and develop a test specification for wave tank testing. The Alpha Phase will be followed by a Beta Phase, which will evaluate one or more concepts assessed as part of the alpha phase using the developed test specification as a base case, to allow for replicable future in-situ MCR wave tank assessments. Both phases will be contracted separately, for clarity this document relates to the Onsite Major Component Replacement Assessment: Alpha Phase only.

2.3. The main objectives of this work are to:

- Identify the current MCR technology gaps using previously completed Floating Wind JIP projects as a basis.
- Develop an overview of the technical maturity for selected MCR concepts.
- For selected MCR concepts undertake numerical model simulations for major component exchange using a hydrodynamic model.
- Develop a test specification and criteria to ultimately feed into the Onsite Major Component Replacement Assessment: Beta Phase

### 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;
- 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:

- 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 in Annex 2 to this document. The Approach to Work should:
  - 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 Floating Wind JIP 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). 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). 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. a pdf copy of the filled-in Bid Price Calculation Sheet;
  - iii. the offered Bid Price, including any cost assumptions deemed relevant by the Bidder – see section 6 and criterion 4 for more details;
  - iv. 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
  - v. 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.
- 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 in this section 4.
- 4.2. The Scope of Work comprises 4 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 Floating Wind JIP Partners. The Carbon Trust and the Floating Wind JIP Partners 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 12-15 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 OMCR project, any assumptions will be discussed with the Floating Wind JIP Partners prior to the start of each Work Package.

## WORK PACKAGES

Work Package	Description of work
<b>WP1: Review of current onsite MCR technologies</b>	<ul style="list-style-type: none"> <li>• Review the high-level outcomes and results from previous Floating Wind JIP projects:             <ul style="list-style-type: none"> <li>◦ TTP</li> <li>◦ HLM</li> <li>◦ SHC</li> </ul> <p>With the specific aim of identifying potential MCR technology concept gaps not already captured and reviewed as part of these previous projects (for example platform-based cranes, tower-based cranes, add on cranes)</p> </li> <li>• Identify and evaluate MCR concepts not previously analysed as part of previous projects.</li> <li>• For the MCR concept analysis develop and agree evaluation criteria in consultation with the Floating Wind JIP partners. As a basis the developed SHC Project Criteria should be used to support the development of the evaluation criteria. However, the agreed criteria is required to have applicability across different MCR concepts.</li> </ul> <p>Note: SHC Project Criteria will be supplied to successful bidder</p> <ul style="list-style-type: none"> <li>• Once the MCR technology concept gaps have been identified, if necessary, engage with the relevant technology concept manufacturers to provide further information.</li> <li>• Using the SHC Project Criteria the contractor is required to propose a shortlist of 3 MCR concepts to be taken forward for further analysis as part of WP2 and WP3.</li> </ul>
<b>Project Deliverables:</b>	<ul style="list-style-type: none"> <li>- <b>D01.1: Report summarising the MCR technologies reviewed including a shortlist of MCR technologies for concept assessment and the defined evaluation criteria developed.</b></li> <li>- <b>D01.2: Record of any stakeholder engagement</b></li> <li>- <b>D01.3: Presentation to the Floating Wind JIP partners.</b></li> </ul>
<b>Decision Gate:</b>	<p>The shortlisted concepts should be presented to the Floating Wind JIP partners for approval prior to the commencement of WP2.</p>
<b>WP2: Technology maturity assessment</b>	<p>The purpose of this work package is to assess the specific maturity of each shortlisted concept. To achieve this, it is expected the successful bidder shall:</p> <ul style="list-style-type: none"> <li>• Evaluate each of the shortlisted concepts and create a comparison analysis matrix detailing:             <ul style="list-style-type: none"> <li>◦ Standards applicability and the progression towards certification</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Technical qualification</li> <li>○ Lifting regulations and applicability within different regions</li> <li>○ Load testing requirements</li> <li>○ Load, motion and acceleration limitations</li> <li>○ Current law applicability/compliance</li> <li>○ Each concepts current development status</li> <li>○ The respective maturity and current/future TRL level</li> <li>○ The development timeline as well as current and future deployment timelines</li> <li>● For each concept type develop generic method statements. The method statements should detail:           <ul style="list-style-type: none"> <li>○ Installation of a solution to the WTG and the subsequent transfer from vessel to tower</li> <li>○ The exchange of nacelle components</li> <li>○ The exchange of blades</li> <li>○ Potential removal of a solution from the WTG</li> <li>○ The transfer of components from the quayside to vessel</li> </ul> </li> </ul> <p>Note: the number of concept types will be dependent on the concepts shortlisted, however it is anticipated there will be a maximum of three concept types.</p>
<b>Project Deliverables:</b>	<ul style="list-style-type: none"> <li>- <b>D02.1: Report detailing the status and technology maturity requirements for the shortlisted concepts</b></li> <li>- <b>D02.2: Presentation to the Floating Wind JIP partners.</b></li> </ul>

#### WP3: Numerical model simulations

- Using the shortlisted MCR concepts evaluated in WP2 undertake numerical modelling simulations. As part of the this the Floating Wind JIP 15MW reference turbine floater designs may be supplied to the successful bidder, specifically the Semi-Sub, barge and TLP models. It should be noted that these models contain limited amounts of hindcast ocean data. If the contractor has their own relevant models and data sets, these could be used instead as the basis for the numerical model simulations. However, any model data outputs that may be used will be required to be shared with Floating Wind JIP partners as part of the analysis.
- To achieve this, the contractor shall:
    - Identify and agree the number of modelling scenarios relevant to each of the 3 concepts, based upon consultation with the Floating Wind JIP partners.
    - Identify and select a hydrodynamic tool such as OrcaFlex to perform numerical simulations.
    - Develop a hydrodynamic model and use to simulate major component replacement operations. This should focus upon:
      - The hydrodynamic interface between vessel and floater and how each concept behaves during each case scenario.

	<ul style="list-style-type: none"> <li>▪ The motion compensating system and how it is used to manage loads on the tower and blades.</li> <li>• Using data from the numerical modelling simulations use Shoreline or Mermaid to assess an entire in-situ MCR process and detail the downtime impacts and the associated planning required.           <ul style="list-style-type: none"> <li>○ To estimate the downtime and assess the operability of the key design requirements should be defined to establish the limiting criteria.</li> <li>○ Specific parameters around the loads, accelerations, and motions should be outlined and agreed with the Floating Wind JIP partners to ensure that it is clear which would be considered acceptable and which ones would be considered a failure.</li> </ul> </li> <li>• Upon completion of the modelling simulations analyse the outcomes and perform a comparison of the performance of the different MCR concepts analysed.</li> </ul>
<b>Project Deliverables:</b>	<ul style="list-style-type: none"> <li>- <b>D03.1: Report detailing the numerical modelling simulations and associated outcomes</b></li> <li>- <b>D03.2: Presentation to the Floating Wind JIP partners.</b></li> </ul>
<b>WP4: Wave tank test specification development</b>	<p>Develop, with input from the Floating Wind JIP partners a test specification to be used for MCR concept wave tank testing. During the Beta Phase of this project, it is anticipated that selected MCR concepts will be tested and subsequently evaluated at a wave tank facility in accordance with this test specification.</p> <ul style="list-style-type: none"> <li>• Develop a test specification detailing the test criteria and phases. As an example, the test specification should detail as a minimum:           <ul style="list-style-type: none"> <li>○ Scale</li> <li>○ Tank type</li> <li>○ Duration</li> <li>○ Number of tests</li> <li>○ Budget</li> </ul> </li> <li>• As part of the test specification development the contractor is required to identify and outline the specific requirements for wave tank testing based on Onsite Major Component Replacement Assessment: Alpha Phase project outputs.</li> <li>• In addition, the contractor should outline the potential budget for undertaking the wave tank testing, detailing prospective outcomes as well as identifying potential facilities that could be used.</li> </ul>
<b>Project Deliverables:</b>	<ul style="list-style-type: none"> <li>- <b>D04.2: Wave tank testing specification to be used as part of the subsequent Beta Phase of this project</b></li> <li>- <b>D04.2: Presentation to the Floating Wind JIP partners.</b></li> </ul>
<b>WPA. Project Management</b>	<p>The Bidder should stipulate how it will manage the Project efficiently and effectively.</p> <p>In particular, the following activities should be included (and hence budgeted for)</p>

	<ul style="list-style-type: none"> <li>• project management time (including sufficient time for review processes);</li> <li>• regular update calls with the Carbon Trust Project Manager and/or Floating Wind JIP Parties as required;</li> <li>• the preparation of monthly flash reports (Carbon Trust template) containing key financial data and information of the delivery status of the Project; and</li> <li>• towards the end of the Project <ul style="list-style-type: none"> <li>◦ the production of a 3-10 pages Executive Summary Report for the entire Project (for dissemination within the Floating Wind JIP);</li> <li>◦ the preparation of a Project Closeout Form (Carbon Trust template) which includes a short summary of areas for future research and a documentation of all Project Deliverables;</li> <li>◦ the preparation of a final presentation to the Floating Wind JIP Parties ;</li> <li>◦ time dedicated to presenting the main results, findings and outcomes of the Project in the form of a 1-hour webinar to the Floating Wind JIP Parties; and</li> <li>◦ the provision of inputs for the Floating Wind JIP Cost Model by completing the Floating Wind JIP Cost Model Input Sheet (Carbon Trust template) to support understanding the cost parameters related to the project.</li> </ul> </li> </ul> <p>Bidders should be aware that the Carbon Trust and the Floating Wind JIP Parties usually require 2-3 weeks to review and provide feedback on each Project Deliverable, with at least one round of review comments to be accommodated. This should be considered when calculating Your Bid Price.</p>
<b>Project Deliverables:</b>	<ul style="list-style-type: none"> <li>- <b>D05: Monthly flash reports</b></li> <li>- <b>D06: Executive Summary Report</b></li> <li>- <b>D07: Final presentation</b></li> <li>- <b>D08: Delivery of webinar</b></li> <li>- <b>D09: Project Closeout Form</b></li> <li>- <b>D10: Input sheet for Floating Wind JIP Cost Model</b></li> </ul>
<b>Expenses</b>	The Bidder should detail the amount of expenses it expects to incur throughout the Project. Expenses will be paid as incurred up to the amount specified and any unused balance will not be paid.

## 5. Intellectual Property, Knowledge and Input Data

- 5.1. Full details of the intellectual property requirements and conditions can be found in the attached Floating Wind JIP Stage III Contractors' Conditions.
- 5.2. The Carbon Trust and/or the Floating Wind JIP 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 Floating Wind JIP Stage III Contractors' Conditions:
  - a) 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 £250,000 however proposals that are able to meet the project requirements for less will be considered favourably.
- 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 must be separately included under Expenses.

## 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: 30%)

Description	Information required from bidders
<b>Proposed Approach</b>	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. The description should include an initial overview on the approach followed by a description on how each Work Package and task will be delivered. Also, Bidders need to justify how their proposed approach meets the objectives of the Project.
<b>Additional Work</b>	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.
<b>Project management</b>	Bidders are required to describe how they will manage the project utilising appropriate resources and describe how they will work with the various stakeholders to acquire information and manage potentially conflicting relationships.

### CRITERION 2: EXPERIENCE (WEIGHTING: 30%)

Description	Information required from Bidders
<b>Experience in floating wind operations and maintenance</b>	In the Main Bid Document, Bidders should elaborate on experience of the criteria described to the left and explain how these past experiences are relevant for this Tender.
<b>Experience in numerical modelling</b>	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).
<b>Experience in and technology evaluation and knowledge of wave tank testing</b>	Bidders are advised that experience is considered a key important 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.

### CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)

Description	Information required from bidders
<b>CVs/Resumes</b>	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.
<b>Applicable skills</b>	Bidders should elaborate on the most relevant skills of the key personnel that will be involved in the Project.
<b>Prior experience from involved staff</b>	Please include examples of similar work performed by the proposed staff members, explaining how is relevant to the Approach to Work.
<b>Expert engagement</b>	A close working relationship with key stakeholders such as crane manufacturers, floater substructure designers, original equipment manufacturers (OEMs), wind turbine manufacturers, vessel operators as well as the Floating Wind JIP Parties are seen relevant to the success of this Project. Please supply ideas of how these groups can be engaged and leveraged.

#### **CRITERION 4: BID PRICE (WEIGHTING: 25%)**

Description	Information required from bidders
<b>Day rates and man hours (man-h) for all staff grades</b>	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
<b>Price for the delivery of the Project</b>	<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 4.</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 &amp; 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)<sup>1</sup>. To meet the initial targets that we have set

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<sup>1</sup> <https://sciencebasedtargets.org/>

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 Floating Wind JIP Stage III 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 Floating Wind JIP Stage III Contractors' Conditions. Please reach out if you need more information on this.

## 8. Glossary

Approach to Work	Has the meaning set out 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 Floating Wind JIP Stage III Contractors' Conditions.
Bidder	An individual, a company, an organisation or a consortium submitting a bid for the Project.
Bid Price	The total price for the Bidder to complete the Project in line with the Approach to Work. 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. The Bid Price shall not include the price of any Additional Work suggested by the Bidder.
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 Floating Wind JIP 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. Information can be taken from summaries written for previous Work Packages
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.
Flash Report	A template provided by the Carbon Trust at Project start.
Floating Wind JIP	Floating Wind Joint Industry Programme
Floating Wind JIP Partners	A group of leading offshore wind farm developers supporting the Floating Wind JIP.
Floating Wind JIP Cost Model	The Contractor is not expected to produce a cost model of its own, but rather provide an estimate, with appropriate explanation, for potential cost 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.
Floating Wind JIP Cost Model Input Sheet	A form (to be provided by Carbon Trust) which the Contractor should complete in WPA to provide input into the Floating Wind JIP Cost Model. I
Invitation to Tender (ITT)	The following group of documents: Description of Tender (this document); Floating Wind JIP Stage III Contractors' Conditions; Tender Certificate template; Bid Price Calculation Sheet template; and Clarification Document (if applicable <sup>2</sup> ).
Main Bid Document	Has the meaning given in section 3.1. No template is provided.
Project	The Onsite Major Component Replacement Assessment (OMCR) – Alpha Phase or OMCR 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.

<sup>2</sup> A Clarification Document will not be published if no clarification questions are received in relation to this ITT.

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.
Tender	Bidder's response to this ITT consisting of the following elements: <ul style="list-style-type: none"> <li>- Main Bid Document (proposal);</li> <li>- signed Tender Certificate; and</li> <li>- Bid Price Calculation Sheet</li> </ul>
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 the Floating Wind JIP 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.