

13th November 2020

Dear Sir/Madam,

**Invitation to Tender for the Improving methods for apportioning seabirds seen at sea both in the breeding season and non-breeding season project for the Carbon Trust's Offshore Renewables Joint Industry Programme (ORJIP) for Offshore Wind**

You are invited to submit a tender for the Improving methods for apportioning seabirds seen at sea both in the breeding season and non-breeding season project (the "AppSaS project" or "Project") which is part of the Offshore Renewables Joint Industry Programme (ORJIP) for Offshore Wind.

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);

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail address: [liam.leahy@carbontrust.com](mailto:liam.leahy@carbontrust.com)

Tenders must be submitted before 15th January 2021. 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	4th December 2020
Clarification Document published <sup>1</sup>	18th December 2020
Submission of full tender	15th January 2021
Bidder interviews	w/c 1st February 2021
Successful Contractor announcement	9th February 2021
Envisaged Contract award date	16th February 2021

Please e-mail any clarification questions, including questions about the timing of this ITT, to [liam.leahy@carbontrust.com](mailto:liam.leahy@carbontrust.com) any time before 4th December 2020. The complete set of clarification questions and all answers to clarification questions will be published in the Clarification Document on our website by 18th December 2020 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,



.....  
Liam Leahy  
For and on behalf of **THE CARBON TRUST**



## Offshore Renewables Joint Industry Programme for Offshore Wind

### Invitation to Tender for the “Improving methods for apportioning seabirds seen at sea both in the breeding season and non-breeding season” Project

### Description of Tender

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## **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.

### Bid evaluation

The received bids will be evaluated by the Carbon Trust and the ORJIP Offshore Wind Partners against the criteria provided in section 9. 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 contained in section 6 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 6 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 Improving methods for apportioning seabirds seen at sea both in the breeding season and non-breeding season 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 5, 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 make a bid. 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 (“ORJIP”) for Offshore Wind is a collaborative R&D programme between The Carbon Trust, EDF Energy Renewables Limited, EDPR UK Limited, Equinor ASA, Ørsted Wind Power A/S, Red Rock Power Limited, RWE Renewables GmbH, Shell Global Solutions International B.V, SSE Renewables Developments UK Limited, 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 the Carbon Trust ORJIP Offshore Wind programme 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 a Project Expert Panel (“PEP”).
- 1.5. This project will fall under the ‘Impacts on Ornithology including displacement and collision risk’ 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 of the AppSaS project**

- 2.1. ORJIP Offshore Wind (OSW) launched its second stage in July 2019 with the objective of identifying, prioritising and selecting research to reduce consenting risk for offshore wind. As part of the project identification process, a ‘call for project ideas’ was issued to the ORJIP OSW Advisory Network in November 2019 with submissions being discussed at the ORJIP Forum in December 2019.
- 2.2. As part of this process, the need to verify current methods of apportioning seabirds at sea to specific population scales during the breeding and non-breeding seasons was identified as a key research topic. Subsequently, the ORJIP OSW Steering Group selected to proceed with a project to consider how connectivity and subsequent apportioning is established.
- 2.3. This project will assess current approaches to apportioning seabirds to Special Protection Area (SPA) colonies and wider regional populations outside of SPAs, and validate their underlying assumptions using empirical data.

### **3. Aims and objective of the AppSaS project**

- 3.1. The aims and objectives of the AppSaS project are to reduce uncertainty in how the offshore wind sector apportions seabirds recorded during at-sea surveys to particular populations. This will enable more robust pre-consent impact assessments by:
- i) Considering how to establish connectivity between birds present in offshore areas at different times of the year and at different population scales (e.g. from biogeographic and regional to breeding colonies and designated sites), crucially including the relative contribution of different populations to seabirds present offshore;
  - ii) Reviewing current approaches to apportioning by using empirical data and other evidence sources to validate their underlying assumptions;
  - iii) Identifying improvements to existing approaches or, if required, identifying and developing new approaches.
- 3.2. In considering 'connectivity', the project will consider the various data and evidence sources available that can support the assumptions involved in quantifying the connectivity of individuals (including birds of different age classes and reproductive stage). It will also set out data considerations in terms of validity, certainty and variability so that as data availability changes, the effect on apportioning methods can be assessed.
- 3.3. Existing apportioning methods include the NatureScot theoretical apportioning approach for breeding birds method<sup>1</sup>, Biologically Defined Minimum Population Scales (BDMPS)<sup>2</sup> and the Marine Scotland Apportioning Tool<sup>3</sup>. This project aims to review these methods and other possible methods to improve the accuracy of breeding and non-breeding season apportioning of birds within environmental impact assessments/Habitats regulation assessments. The project will also take an approach that includes methods for apportioning seabirds to colonies outside of SPAs, and allows birds to be apportioned to larger population scales (e.g. regional or biogeographic)).

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<sup>1</sup> Scottish Natural Heritage. 2018. Interim guidance on apportioning impacts from marine renewable developments to breeding seabird population in special protection areas.

<https://www.nature.scot/interim-guidance-apportioning-impacts-marine-renewable-developments-breeding-seabird-populations>

<sup>2</sup> FURNESS, R.W. 2015. Non-breeding season populations of seabirds in UK waters: Population sizes for Biologically Defined Minimum Population Scales (BDMPS). Natural England Commissioned Reports, Number 164.

<sup>3</sup> Butler, A., Carroll, M., Searle, K., Bolton, M., Waggitt, J., Evans, P., Rehfisch, M., Goddard, B., Brewer, M., Burthe, S. and Daunt, F. 2020. Attributing seabirds at sea to appropriate breeding colonies and populations (CR/2015/18). Scottish Marine and Freshwater Science Vol 11 No 8, 140pp.

<https://doi.org/10.7489/2006-1>

- 3.4. The review of these methods will as a minimum include:
- i) reviewing the data required/underpinning these methods;
  - ii) identifying their underlying assumptions and the degree of confidence in these;
  - iii) evaluating the extent of uncertainty associated with their use;
  - iv) assessing their strengths and weaknesses.
- 3.5. Where possible, this project will be informed by the use of independent empirical data to evaluate the outputs of existing methods for quantifying connectivity, and assess apportioning methods. The overall objective is to review existing approaches and, following a review of current data, either a) identify improvements to existing approaches; or b) identify and develop new approaches/tools for establishing connectivity and apportioning seabirds to SPAs to reduce uncertainty in the consenting process.

#### **4. Project Rationale**

- 4.1. At-sea survey data form the basis for assessing the baseline spatial abundance and distribution of seabirds within a wind farm footprint and its surrounding area. At-sea transect surveys do not generally provide much, if any, information to indicate the provenance of the individuals seen, both in terms of the specific breeding colony or populations they belong to. Yet, at any time of year and in any given area of sea it is quite likely that the birds seen comprise a mixture of individuals from different colonies or populations, which is particularly true outside the breeding season. In order to use at-sea survey data to assess the impacts of offshore renewables development (ORD) on populations within discrete SPAs and at other wider population scales, it is necessary to:
- i) use evidence (or assumptions) regarding the known or suspected distributions of birds from different populations to establish those that have some degree of connectivity with the ORD, and;
  - ii) estimate the percentage of birds seen in the project area that originate from each population that is known/assumed to have connectivity with the ORD, and is therefore likely to be represented by the individuals seen (e.g. from various SPA populations or regional populations during the breeding and non-breeding seasons).
- 4.2. There is also a need to account for how connectivity between birds present in offshore project areas and the population scale of interest (e.g. SPAs) will vary according to the age class and status of individuals (e.g. breeding or sabbatical birds), and due to spatial and temporal variation in connectivity within and between seasons.
- 4.3. Current approaches used to determine connectivity between birds in an ORD and specific populations, and those then used to apportion individuals to these populations make a range of assumptions about the spatial and temporal distribution of birds in offshore waters at different times of year. Resultantly, there is uncertainty and variability associated with connectivity and apportioning assessments. This project must identify and consider the confidence of all assumptions, and assess the magnitude of uncertainty and variability in both the data and methodologies currently used, and in any new data and methods proposed.
- 4.4. Apportioning seabirds at sea to SPAs and wider population scales in the non-breeding season is one area of environmental impact assessment that requires improvement. As more data and information on the distribution and origins of these birds becomes available (e.g. from year-round tracking studies such as GPS and GLS data), there is



a need to review our understanding of and methods for apportioning birds to SPAs and other population scales during the non-breeding season.

- 4.5. Assessments of current apportioning methods may indicate a lack of confidence in their underlying assumptions, a high degree of uncertainty and/or variability in their underlying data or outputs, or a lack of consistency between outputs and independent empirical data. Consequently, a key output of this project will be to develop ways in which existing approaches could be modified, and if necessary, develop entirely new methods or provide recommendations for identifying uncertainty in each approach, preferably through quantitative methods.

## **5. Tender documents for submission**

5.1. 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 Technical & Financial Proposal;
- ii. The signed Tender Certificate (pdf) – template provided; and
- iii. The filled-in Bid Price Calculation Sheet (xls) – template provided.

5.2. 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 6 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;
  - any Alternative Work (i.e. substitute activities to take place instead of certain activities outlined in the Scope of Work in section 6). 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
  - any Additional Work (i.e. activities to take place in addition to the activities outlined in the Scope of Work in section 6). 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 8 and criterion 5 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.
- 5.3. The Tender Certificate must be signed by an authorised signatory. Bidders must fill in the provided template.
- 5.4. 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 8 and criterion 5 for more details.
- 5.5. 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.

## **6. Scope of Work**

- 6.1. The Scope of Work is provided in this section 6.
- 6.2. 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.
- 6.3. It is expected that the Contractor will report on Project Deliverables to the ORJIP Offshore Wind Steering Group and Project Expert Panel. The Carbon Trust, ORJIP Offshore Wind Steering Group and Project Expert Panel 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.
- 6.4. 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.
- 6.5. 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 bid 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.
- 6.6. The Carbon Trust appreciates that it will take a small team of mixed seniority approximately 12 months to complete the Project.
- 6.7. 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.
- 6.8. 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 AppSaS Project, any assumptions will be discussed with the ORJIP Steering Group and Project Expert Panel prior to the start of each Work Package.

## Work Packages

Work Package	Description of Work
<p><b>WP1 Review</b></p>	<p><b>Goal</b></p> <p>To review and evaluate current methods of establishing ‘connectivity’ between seabirds and SPAs/other population scales, and apportioning seabirds at sea during the breeding and non-breeding seasons across the international offshore wind industry. To outline the advantages and disadvantages of current methods which can be applied in a UK context.</p> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>- Review: <ul style="list-style-type: none"> <li>a. existing methods for establishing connectivity between seabirds and SPAs/other population scales;</li> <li>b. how connectivity data is used to apportion seabirds to SPAs or other population scales during the breeding and non-breeding seasons, including their underlying data sources, assumptions and areas of uncertainty. In doing so, provide an assessment of their strengths and weaknesses (including level of error) to support their validity.</li> </ul> </li> </ul> <p>The methods under review should include, but are not limited to the SNH theoretical approach for apportioning<sup>4</sup>, the non-breeding season BDMPS<sup>5</sup> method and the Marine Scotland Apportioning Tool<sup>6</sup>.</p> <ul style="list-style-type: none"> <li>- Literature review of empirical studies concerning seabird distribution, movements and segregation that may already inform existing connectivity and apportioning approaches, and/or may be used to test their assumptions and/or outputs.</li> <li>- This review should inform the assessment of assumptions used within existing approaches to connectivity and apportioning, e.g. what do we know about the breeding season distribution of all "stages" in a seabird population that are not the breeding adults, but are nonetheless critical to future population well-being?</li> <li>- The review should also outline our current understanding of important considerations such as: <ul style="list-style-type: none"> <li>o The definitions of breeding and non-breeding season;</li> </ul> </li> </ul>

<sup>4</sup> NatureScot 2018. Guidance - Apportioning impacts from marine renewable developments to breeding seabird populations in SPAs. <https://www.nature.scot/interim-guidance-apportioning-impacts-marine-renewable-developments-breeding-seabird-populations>

<sup>5</sup>FURNESS, R.W. 2015. Non-breeding season populations of seabirds in UK waters: Population sizes for Biologically Defined Minimum Population Scales (BDMPS). Natural England Commissioned Reports, Number 164.

<sup>6</sup> Searle, K., Butler, A., Bogdanova, M. and Daunt, F. 2020. Scoping Study - Regional Population Viability Analysis for Key Bird Species CR/2016/16. Scottish Marine and Freshwater Science Vol 11 No 10, 118pp. DOI: 10.7489/12327-1

	<ul style="list-style-type: none"> <li>○ Spatial and temporal variability in the offshore distribution of species both within and between seasons (e.g. across years);</li> <li>○ Aspects of spatial and temporal distribution linked to individual age class or status (e.g. breeding or sabbatical birds);</li> <li>○ Aspects of spatial and temporal distribution linked to colony of origin and biogeography.</li> <li>- It should include an assessment of any assumptions made and uncertainties in the methods.</li> <li>- The review should also include an assessment of how data available from at-sea surveys (e.g. density, bird age, flying direction) could be used to inform connectivity assessments and methods for apportioning seabirds at sea.</li> </ul>
<p><b>Deliverables</b></p> <ul style="list-style-type: none"> <li>• <b>DO1 A report providing a review of all current methods of (a) establishing connectivity between seabirds and SPAs/other population scales, and (b) apportioning seabirds at sea during the breeding and non-breeding seasons, which will at a minimum include:</b> <ul style="list-style-type: none"> <li>i) the nature of the data/evidence underpinning current approaches;</li> <li>ii) the assumptions made in current approaches;</li> <li>iii) the strengths and weaknesses of each method;</li> <li>iv) a summary of the key uncertainties and shortcomings of each method;</li> <li>v) an assessment of the validity of the assumptions used within each approach.</li> <li>vi) Based on its conclusions, the review could also provide recommendations on whether current approaches could be improved or whether new approaches are needed.</li> </ul> </li> </ul>	
<p><b>WP2 Data Identification &amp; Acquisition</b></p>	<p><b>Goal</b></p> <p>Identify &amp; acquire new data sources and/or the types of analyses of existing/new data that are needed to either develop amendments to existing methods of establishing connectivity and apportioning, or create new methods.</p> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>- Facilitate the selection of species to be included in the data identification process with the Project Expert Panel (PEP), &amp;&amp; ORJIP Steering Group including but not limited to: kittiwake, herring gull, gannet, fulmar, common guillemot, puffin, lesser black-backed gull, great black-backed gull, tern species and razorbill.</li> <li>- For the species chosen, identify &amp; acquire relevant data sources on the distribution, movement and origin of birds at different times of the year.</li> <li>- This should include (i) consideration of birds of different age classes and breeding status and (ii) data on the factors that affect offshore distribution and abundance of seabirds (including their spatial and temporal variability).</li> <li>- Datasets beyond tracking studies should be considered in this process given their importance towards apportioning immature and sabbatical breeders. Such datasets could include:</li> </ul>

	<ul style="list-style-type: none"> <li>○ Data from local bird reports;</li> <li>○ Literature on the timing of migrations;</li> <li>○ Trektellen data for migration sites;</li> <li>○ Colony specific data on timing of arrival, departure, breeding etc.;</li> <li>○ Ring recovery data;</li> <li>○ Biometric data;</li> <li>○ Genetic marker data;</li> <li>○ Stable isotope data (including other markers, e.g. pollutants);</li> </ul> <ul style="list-style-type: none"> <li>- Geolocator data.</li> <li>- Data should not be constrained to current definitions of breeding or non-breeding seasons for a given species or region. For example, an apportioning solution could be conducted on a monthly basis rather than for a whole breeding season.</li> <li>- For each dataset proposed, associated uncertainties and biases should be highlighted for consideration in the delivery of WP3.</li> <li>- Data sources, both existing &amp; new, do not need to be restricted to UK coverage. Non-UK data sources that are relevant to species in UK waters and can inform this project should also be considered.</li> </ul>
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**Deliverables**

- **D02a Detailed list of data sources that could be used to improve existing approaches or develop new approaches / tools, and proposed methods for their application.**
- **D02b Agreement with the PEP & ORJIP Steering Group on data sources to take forward into WP3.**
- **D02c A data management plan outlining clearly the data format and requirements**
- **D02d Acquired datasets with permission to be used from data owner and if necessary, any confidentiality undertaking**

**Go/no go decision point for WP3**

<b>WP3 Method Evaluation</b>	<p><b>Goal</b></p> <ul style="list-style-type: none"> <li>- Evaluate apportioning methods identified during WP1 by utilising the datasets from WP2 to determine their consistency and assess their strengths/weaknesses.</li> </ul> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>- For each apportioning method identified and reviewed under WP1, progress its evaluation using datasets identified during WP2 to determine its consistency.</li> <li>- The evaluation should assess the extent of uncertainty associated with each method and its strengths and weaknesses.</li> <li>- Recommendations should also be made on how each method could be improved.</li> </ul>
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**Deliverables**

- **D03 Final report summarising the outcomes of WP1 – 3 with recommendations on how the assessed apportioning methods can be improved, as agreed with the PEP & ORJIP Steering Group.**

PEP to recommend to ORJIP SG: Go/no go decision point for WP4 based on conclusions of WP1 - 3

**Go/no go decision point for WP4**

<p><b>WP4 Tool Development</b></p>	<p><b>Goal</b></p> <p>Develop a tool to calculate apportioning percentages in a suitable format as agreed with the PEP &amp; ORJIP Steering Group.</p> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>- Present a proposal based on WP 1 – 3 to the PEP on the development of a tool to calculate apportioning percentages, considering an appropriate format for tool, the ability for the tool to be easily updated with new data sources and requirements for hosting this tool.</li> <li>- Following feedback from the PEP &amp; ORJIP Steering Group, develop a tool to calculate apportioning percentages for a defined user.</li> <li>- Work with the project manager to identify a location to host the tool and support the project manager in completing transfer of the tool to its new host location.</li> </ul>
<p><b>Deliverables</b></p> <ul style="list-style-type: none"> <li>• <b>D04a Tool Package including a fully functional and tested apportioning tool in a suitable format with underlying code, and a report summarising how the tool was developed and guidance on how to use the tool.</b></li> <li>• <b>D04b Final report summarising the outcomes of WP4 with the outcomes/conclusions agreed with the PEP and ORJIP Steering Group.</b></li> </ul>	
<p><b>WP5 Project Validation</b></p>	<p><b>Goal</b></p> <p>To provide a 3rd party review of the project and outputs to assess its accuracy and identify any shortfalls to progress the final report as a scientific publication.</p> <p><b>Activity</b></p> <p>Conduct Peer Review including:</p> <ul style="list-style-type: none"> <li>a. An independent review of project and outputs;</li> <li>b. Publication of scientific report.</li> </ul>
<p><b>Deliverables</b></p> <ul style="list-style-type: none"> <li>• <b>D05a A short report outlining the validity of the project and outputs.</b></li> <li>• <b>D05b Publication of scientific peer reviewed report.</b></li> </ul>	
<p><b>WPA Project Management</b></p>	<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> </ul>

	<ul style="list-style-type: none"> <li>• regular update calls with the Carbon Trust Project Manager and/or and/or ORJIP OSW Steering Group and/or PEP 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 ORJIP Offshore Wind);</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 ORJIP Offshore Wind Steering Group and Project Expert Panel;</li> <li>○ time dedicated to presenting the main results, findings and outcomes of the Project in the form of a 1-hour webinar to ORJIP Offshore Wind Partners; and</li> <li>○ the provision of inputs for the ORJIP Offshore Wind Risk Model by completing the ORJIP Offshore Wind Risk Model Input Sheet (Carbon Trust template).</li> </ul> </li> </ul> <p>Bidders should be aware that the Carbon Trust, ORJIP Offshore Wind Steering Group and the Project Expert Panel 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>
<p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>• <b>DAa: Monthly flash reports</b></li> <li>• <b>DAb: Executive Summary Report</b></li> <li>• <b>DAc: Final presentation</b></li> <li>• <b>DAd: Delivery of webinar</b></li> <li>• <b>DAe: Project Closeout Form</b></li> <li>• <b>DAf: Input sheet for ORJIP Offshore Wind Risk Model</b></li> </ul>	
<p><b>WPB Expenses</b></p>	<p>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.</p>

## **7. Intellectual Property and Knowledge**

Full details of the intellectual property requirements and conditions can be found in the attached ORJIP Offshore Wind Stage II Contractors' Conditions.

## **8. Bid Pricing**

- 8.1. 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 range between **£100k and £120k**.
- 8.2. 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.
- 8.3. If the Bid Price exceeds the expected range of the Total Budget as stated under section 8.1, to avoid receiving a lower score for criterion 5, in the Main Bid Document the Bidder should provide a clear and justified reason why the Bid Price exceeds the expected budget.
- 8.4. 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.
- 8.5. Any expenses must be separately included under Expenses.



## 9. Tender Evaluation Criteria

Bidders should take the following evaluation criteria into account when preparing and submitting their tenders.

### Criterion 1: Approach to Work (Weighting: 25%)

<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 ORJIP Offshore Wind PEP, to get information and manage potentially conflicting relationships.</p>

### Criterion 2: Experience (Weighting: 25%)

<i>Description</i>	<i>Information required from Bidders</i>
Experience and knowledge	<p>In the Main Bid Document, Bidders should elaborate on experience of the criteria described and explain how these past experiences are relevant for this tender. Of particular importance will be the Bidders 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 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.</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"> <li>• Understanding of the requirements under EU and UK legislation;</li> </ul>

	<ul style="list-style-type: none"> <li>• Practical understanding of the offshore wind industry, including consenting/licensing processes and operation of offshore wind farms;</li> <li>• Understanding of conservation science, including ornithology expertise and knowledge of offshore wind farms;</li> <li>• A track record of satisfactory health, safety and quality management;</li> <li>• Experience of undertaking authoritative studies in relevant applied science areas;</li> <li>• Experience of reporting and presenting the results of studies in relevant applied science areas;</li> <li>• Experience of applying statistical skills to the design and undertaking of relevant studies;</li> </ul> <p>Experience of working collaboratively with regulatory bodies and industry, ideally including the renewables industry and Statutory Nature Conservation Bodies.</p>
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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, 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 tenderers may not be able to commit to access or use of 3 <sup>rd</sup> party data without permission from the owner. A key criterion for scoring is that tenderers 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.

### Criterion 5: Bid Price (Weighting: 25%)

<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 8. 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>

## 10. Glossary

Approach to Work	Has the meaning set out in section 5.1.
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	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 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 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.
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 <sup>7</sup> ).
Main Bid Document	Has the meaning given in section 5.1. No template is provided.
Project	The Improving methods for apportioning seabirds seen at sea both in the breeding season and non-breeding season or AppSaS 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 6) or as otherwise agreed in the Final Scope of Work.
Project Expert Panel	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.
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 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

<sup>7</sup> A Clarification Document will not be published if no clarification questions are received in relation to this ITT.

	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.
Scope of Work	The (preliminary) Work Programme for the Project as defined in section 6 of this document. At Contract award, the Scope of Work will be replaced by the Final Scope of Work.
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.