

Dear Sir/Madam,

Invitation to Tender for the Quality and Quantity of Qualified Termination Specialists project for the Carbon Trust's OWA Programme

You are invited to submit a tender for the Quantity and Quality of Qualified Termination Specialists project (the "QQQTS project" or "Project") which is part of the Offshore Wind Accelerator (OWA) programme. The key objective of the Project is to improve the quality and efficiency of termination installation including identifying and addressing the root causes of failures, implementing standardised training and control procedures, and proactively addressing potential future skills shortages.

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

- Description of Tender (this document);
- OWA Stage IV Contractors' Conditions;
- Tender Certificate (Word template);
- Bid Price Calculation Sheet (Excel template);
- Clarification Document (if applicable¹);
- Project Closeout Form (for information purposes only – no need to complete); and
- OWA Cost Model Input Sheet (for information purposes only – no need to complete).

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail address: karolina.zieba@carbontrust.com and bethany.white@carbontrust.com.

Tenders must be submitted before 30 September 2023 (12:00 BST). 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	1 September 2023 (12:00 BST)
Clarification Document published	8 September 2023 (12:00 BST)
Submission of full tender	30 September 2023 (12:00 BST)
Bidder interviews	October 2023
Successful Contractor announcement	October/November 2023
Envisaged Contract award date	November 2023

Please e-mail any clarification questions, including questions about the timing of this ITT, to karolina.zieba@carbontrust.com and bethany.white@carbontrust.com any time before 1 September 2023 (12:00 BST). The complete set of clarification questions and all answers to clarification questions will be

¹ A Clarification Document will not be published if no clarification questions are received in relation to this ITT.

published in the Clarification Document on our website by 8 September 2023 and will hence be visible to all potential Bidders: <https://www.carbontrust.com/news-and-events/tenders>

For information about the OWA programme, please see the Carbon Trust's website: <https://www.carbontrust.com/our-projects/offshore-wind-accelerator-owa>

We look forward to receiving your tender.

Yours sincerely,
Bethany White and Karolina Zieba

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

THE CARBON TRUST OFFSHORE WIND ACCELERATOR

Invitation to Tender for the “Quantity and Quality of Qualified Termination Specialists” 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 OWA Partners against the criteria provided in section 7. 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 4 of this document does not constitute an offer to contract with the Carbon Trust. It only represents a definition of specific requirements and an invitation to submit a tender addressing these requirements.

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

Should Your tender be successful, a Final Scope of Work that builds upon the Scope of Work contained in section 4 of this document and Your Approach to Work will be mutually agreed between You and the Carbon Trust. Once the Final Scope of Work is agreed, Your offer will be formally accepted by the Carbon Trust issuing an Award Letter, the Final Scope of Work, the OWA Stage IV Contractors' Conditions, and any clarifications agreed in writing. The Award Letter, the Final Scope of Work, the OWA Stage IV Contractors' Conditions, and any clarifications agreed in writing will establish the Contract for the QuaQuantity and Quality of Qualified Termination Specialistsntity and Quality of Qualified Termination Specialists project (the "**Contract**") between You and the Carbon Trust. With the exception of any minor amendments to the OWA Stage IV Contractors' Conditions which may be requested by the Bidder, the submission of a tender shall constitute unqualified acceptance of the OWA Stage IV Contractors' Conditions. In the event that minor amendments to the OWA Stage IV 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. We understand that any requests for amendments made after submission of the offer (i.e. not included in Annex A) shall not be considered by the Carbon Trust.

Mechanics of the tender process

Bidders should note that:

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

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

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

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

Conflicts of interest

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

Disclaimer

The information contained in this Description of Tender document and in any documents or information it refers to or incorporates (the "**Disclosed Information**") has been prepared to assist interested parties in deciding whether to 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 Wind Accelerator

- 1.1 The Offshore Wind Accelerator (“**OWA**”) is an industry-driven collaborative research, development and demonstration programme which was initially launched by the Carbon Trust in 2008 in collaboration with five offshore wind developers. The programme has since expanded during OWA Stages I, II, III and IV to include currently nine offshore wind developers from various countries within the European Economic Area (the “**OWA Partners**”). At the time of issue of this Invitation to Tender the OWA Partners are: SSE Renewables Developments (UK) Limited, Ørsted Wind Power A/S, RWE Renewables GmbH, ScottishPower Renewables (UK) Limited, Equinor ASA, Vattenfall Vindkraft A/S, EnBW Energie Baden-Württemberg AG, Shell Global Solutions International B.V. and TotalEnergies OneTech Limited.
- 1.2 OWA Stage IV aims to continue the cost reduction of offshore wind to make it cost competitive with other sources of energy generation, overcome market barriers, develop industry best practice, trigger the development of new industry standards and support the international expansion of offshore wind.
- 1.3 Research under the OWA currently falls into five research areas: Cables, Electricals, Foundations, Logistics and O&M, and Energy Yield & Performance. Research, development and demonstration projects are carried out in each of the five research areas to address technology challenges. This Invitation to Tender is related to the OWA cables research area.
- 1.4 Each of the five research areas is managed by the Carbon Trust and governed by a Technical Working Group (“**TWG**”) consisting of technical experts appointed by the OWA Partners. The TWG Cables will supervise the Project, provide technical direction and guidance to the Contractor (where needed) and review the Project Deliverables, findings and other outcomes.
- 1.5 Please note, the term “Contractor”, where used within this document, refers only to the successful Bidder or, in the event that the Contract is awarded to a consortium, the successful Bidders.

2. Background and objective of the QQQTs project

2.1 The OWA TWG Cables would like to investigate the quality and efficiency of termination installation including identifying and addressing the root causes of failures, implementing standardised training and control procedures, and proactively addressing potential future skills shortages.

2.2 Background:

The inner array power grids of offshore wind farms are facing challenges due to growing numbers of submarine cable outages. Particularly, the outages are located at the cable terminations, and this is often due to poor installation techniques for all array cable sizes. For example, a notable issue coming from this is a humidity increase and subsequent corrosion between sheath and termination. This brings additional thermal stress and breakdown of insulation.

Despite significant efforts from OEMs and installers to ensure high-quality termination, there is an industry wide issue with the quality of workmanship in installing cable terminations. There is a significant lack of reliable published termination installation techniques detailing best practice and control procedures and this issue is compounded by a predicted further shortage of suitably trained specialists as the industry scales up and looks towards 132 kV terminations. CIGRE TB 476 for higher voltage equipment contains gaps which need to be identified and improvements made. Jointers are often upskilled from lower voltages, whereas the preference would be for jointers to move down from higher voltages.

2.3 The main objectives of this work are to:

- a. Understand failures in termination installation for all connector types, but with a particular focus on T-connectors.
- b. Define, improve and standardise training and control procedures, which will be applicable at 66 kV and 132 kV.
- c. Increase the quality of termination installation.
- d. Quantify demand on workforce and future skills shortages, identify limiting factors and incentives for increased workforce, through supply chain engagement.

2.4 To meet the aims and objectives of this project the deliverables will be broken down into a number of work packages which overall deliver the following:

- a. Report on the literature, market and standards review.
- b. Recommendations/Technical Guidelines for termination installation techniques and control procedures (including jointing records).
- c. Recommendations for training and evaluation of jointer competency to increase installation reliability.
 - i. Jointer qualification proforma equivalent to CIGRE TB 476 Appendix A
 - ii. Jointer qualification proforma equivalent to CIGRE TB 476 Appendix B
- d. Proposal for increasing the quantity of qualified jointers (Optional).

- e. Report outlining findings on installation conditions (Optional).

2.5 The expected benefits of this work are:

- a. Reduced risk of failure due to poor workmanship, resulting in reduced downtime
- b. Improved consistency in skills across workforce
- c. De-risk timelines due to shortage of qualified personnel, resulting in reduced timescales/costs

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 OWA 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 6 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 TWG. The Carbon Trust and TWG 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 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.
- 4.6 The Carbon Trust appreciates that it will take a team of mixed seniority approximately 12 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 QQTS Project, any assumptions will be discussed with the TWG prior to the start of each Work Package.
- 4.9 The Scope of Work includes 2 Optional Work Packages. These are the Work Packages that the TWG will reserve the right to execute or dismiss in the course of the Project. The Bidder's Approach to Work should address these Optional Work Packages, but they should be kept and highlighted as optional in the Bidder's Approach to Work.

Work Packages

Work Package	Description of work
WP1: Literature, Market and Standards Review	<p>The Contractor should undertake a literature, market and standards review to understand:</p> <ul style="list-style-type: none"> • The frequency and causes of termination/sheath failures (the S4Y4 project Testing of Array Cables is also looking to gather information on failures, which we intend to share with this project as far as possible if the timescales allow). • The context in which the termination/sheath failures occurred, such as the cable design, electrical loads of the conductor and screen etc., if this information is available. • The impacts of installation techniques on effective installation of terminations. • Gaps in training procedures and qualifications. • The need for standardised approaches and training requirements. <p>The review should cover all connector types. However, it is noted that T-connectors aren't included in the CIGRE brochures so the contractor should ensure these are included in the literature review.</p> <p>If in the process of the literature review the contractor identifies any connector design choices as being more optimal for supporting improved installation, this should be highlighted in the report, however, this should not be the main focus.</p>
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D01: Literature, market and standards review report. - D02: Presentation of findings from the literature review to the Technical Working Group. 	
WP2: Stakeholder engagements	<p>Stakeholder engagement will be key to the success of this project. The contractor should undertake engagement with the following stakeholders to identify and understand issues:</p> <ul style="list-style-type: none"> • Termination suppliers (this should include engagement on the training run by termination suppliers for their products, the contractor should aim to understand what is possible now and the areas that could be developed.) • Termination installers • Contractors that hire termination joiners • Third party training organisation that offer training for jointers. <p>When engaging with the above stakeholders, in addition to establishing where the issues lie in termination installation, the contractor will also assess the following:</p>

	<ul style="list-style-type: none"> • Jointer technical training and jointer records, understand status of skilled people, how they are trained and where they are sourced from. • size of the resource pool for jointers at 66 kV and 132 kV (quantify demand on workforce – number of jointers at 66 kV and 132 kV vs market demand*, expected projections, establish limiting factors on number of jointers and identify if there are any key barriers to entry for trainees). • Feedback on developing defined roles and responsibilities for certification and a training register. • Understand how they review CVs and how they are proposing jointers to the contractor who hold the contract for termination installation. <i>(For contractors hiring termination jointers only.)</i> <p>*The market structure should be considered when carrying out this exercise, e.g., many jointers are freelance so they could appear on multiple books. The contractor may need to consider permanent staff and freelancers separately.</p> <p><i>It is expected that the contractor will list their existing relevant stakeholder relationships in their proposal.</i></p>
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D03: Stakeholder engagement outcomes report. - D04: Presentation of findings from stakeholder engagement to the Technical Working Group. 	
<p>WP3: Definition of standardised approach and qualification</p>	<p>Using the insights gained in the previous work packages, the contractor should aim to define the following:</p> <ul style="list-style-type: none"> • Termination installation techniques and control procedures, including template jointing records. This should distinguish between different connection approaches e.g., direct to the switchgear, or using the junction box or joints. • Standardised approach to installation and training procedures. It is recognised that standardisation is only possible to a certain extent due to variation in factors such as conductor type and size, electrical screen design and load etc. The contractor should propose in which areas standardisation of approach is possible and could agree some case studies with the working group to be used as a basis e.g., for different types of cable design. • A defined set of roles, responsibility of certification and development of a register for trained operatives. • Recommended hold points during termination installation for QA/QC purposes and how that data should be captured e.g., photo and sign off before progressing to next step of the jointing procedure.

	<ul style="list-style-type: none"> • Develop CIGRE TB 476 Appendix A and B equivalent documents in Excel. These documents should be applicable to all connector types, but it is noted that T-connectors are not included in the CIGRE brochures so the contractor should ensure these are considered and included.
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D05: Report defining standardised approach to installation and training procedures and qualification. - D06: CIGRE TB 476 Appendix A and B equivalent documents in native editable format. - D07: Presentation of findings to the Technical Working Group. 	
<p>WP4: Recommendations/technical guidelines</p>	<p>The contractor will develop recommendations and technical guidelines for the following:</p> <ul style="list-style-type: none"> • Termination installation techniques and control procedures. • Training and evaluation of jointer competency to increase installation reliability. • Progression plan for conversion of resource from other parts of the electrical industry (from steps they would need to go through and how they would become adequately trained and experienced to then carry out the job unsupervised). • Further initiatives that might be needed if the number of jointers available is insufficient. <p>Any optimal design choices identified through the literature review should also be highlighted in the recommendations.</p> <p>As defined in WP3, the following deliverables will be attached to the recommendations and technical guidelines as appendices in both native and pdf format when possible:</p> <ol style="list-style-type: none"> 1) Jointer Training Certification (Apprentice or Basic/Senior /Supervisory) with activities as appropriate (CIGRE TB 476 Appendix A and B equivalents). 2) Common Jointing Record Template. (It would be preferable to have consistency across the industry.) 3) Competency matrix and progression plan for conversion of resource from an alternative electrical industry into termination installation. <p>The expectation is that the recommendations and technical guidelines will be published on the Carbon Trust website for use by the industry. To disseminate the findings:</p> <ul style="list-style-type: none"> • Information will be made available to CIGRE to aid development of standards. • A workshop will take place with relevant stakeholders e.g., jointing contractors, training organisations.

	<ul style="list-style-type: none"> • Engagement is expected to take place with OWA partners' commercial teams to make this a requirement in procurement. • Presentations will be given by the Carbon Trust at 2-3 relevant conferences to disseminate the project outcomes. <p>The contractor is expected to contribute to these dissemination activities.</p>
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D08: Report containing the recommendations and technical guidelines, with the associated templates as appendices. - D09: Presentation of recommendations and guidelines to the Technical Working Group. 	
<p>WP5 (Optional): Quantity of termination specialists</p>	<p>The working group will decide on whether to proceed with this work package, based upon the outcomes of the engagement from WP2. If this work package goes ahead, the contractor will produce a proposal containing the following, building on the supply chain engagement from WP2:</p> <ul style="list-style-type: none"> • Existing size of the resource pool for jointers at 66 kV and 132 kV • Current market demand for jointers at 66 kV and 132 kV • Distribution of experience of the current resource pool • Projections of future demand and where the shortfalls are, both in terms of number of jointers and skills gaps • Limiting factors on the number of qualified jointers • Proposed mitigations and approaches for increasing the number of jointers, such as incentives, advertisements etc. <ul style="list-style-type: none"> ○ <i>(It is expected that the proposal will form a basis for further scoping in this area, rather than full recommendations being provided at this stage.)</i>
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D10: Proposal for increasing the quantity of qualified jointers. - D11: Presentation of findings from the proposal to the Technical Working Group. 	
<p>WP6 (Optional): Installation conditions for terminations</p>	<p>The working group will decide on whether to proceed with this work package based on the outcome of previous work packages. If this work package goes ahead, the contractor will:</p> <ul style="list-style-type: none"> • Set out adequate durations for different types of terminations as a benchmark to stop pressure being applied during projects to expedite schedule. • Set out procedures, who to engage and when, what risk assessments to carry out, to ensure maximum success of the environment being right for successful installation of terminations. • Produce 3D CAD drawings, showing stage by stage installation procedures, assessment of bend stiffness and radii etc.

	<ul style="list-style-type: none"> • Consider potential options for installation depending on different types of offshore wind turbines etc.
<p>Project Deliverables:</p> <ul style="list-style-type: none"> - D12: Report on considerations for termination installation conditions. - D13: Presentation of findings on the installation conditions to the Technical Working Group. 	
<p>WPA. Project Management</p>	<p>It is expected that the project will be delivered by a third-party organisation that can bring some experience of (or engage with another party with experience of):</p> <ul style="list-style-type: none"> • Investigating termination failures. • Jointing and termination. • Accessory suppliers or people/training suppliers. <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"> • project management time (including sufficient time for review processes); • regular update calls with the Carbon Trust Project Manager and/or Technical Working Group as required; • the preparation of monthly flash reports (Carbon Trust template) containing key financial data and information of the delivery status of the Project; and • towards the end of the Project <ul style="list-style-type: none"> ○ the production of a 3-10 pages Executive Summary Report for the entire Project (for dissemination within the OWA); ○ the preparation of a Project Closeout Form (Carbon Trust template) which includes a short summary of areas for future research, a summary of relevant HSE aspects, and a documentation of all Project Deliverables; ○ the preparation of a final presentation to the TWG; ○ time dedicated to presenting the main results, findings and outcomes of the Project in the form of a 1-hour webinar to OWA Partners; and ○ the provision of inputs for the OWA Cost Model by completing the OWA Cost Model Input Sheet (Carbon Trust template). <p>Bidders should be aware that the Carbon Trust and TWG 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>Project Deliverables:</p> <ul style="list-style-type: none"> - D14: Monthly flash reports. - D15: Executive Summary Report. - D16: Delivery of internal close-out webinar. - D17: Submitting all internal close out documents. - D18: Input sheet for OWA Cost Model (if relevant). 	

Expenses	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.
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5. Intellectual Property, Knowledge and Input Data

- 5.1 Full details of the intellectual property requirements and conditions can be found in the attached OWA Stage IV Contractors' Conditions.
- 5.2 The Carbon Trust and/or the OWA 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 OWA Stage IV 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 expected to be £85,000.
- 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.

CRITERION 1: APPROACH TO WORK (WEIGHTING: 30%)

Description	Information required from Bidders
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 OWA TWG, to get information and manage potentially conflicting relationships.</p>

CRITERION 2: EXPERIENCE (WEIGHTING: 35%)

Description	Information required from Bidders
Experience in jointing and termination, and investigating termination failures.	<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.</p>
Experience in analysing and/or developing training and control procedures.	<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>
Experience in developing standardisation and recommendations for approach.	<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>
Existing relevant stakeholder relationships and experience in conducting	

stakeholder engagement.	
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CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)

Description	Information required from Bidders
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/stakeholder engagement	A close working relationship with key stakeholders such as termination specialists as well as the OWA Technical Working Group 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: 20%)

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

	<p>Bidders will be required to confirm or comment on their ability to carry out the activities detailed in the Scope of Work within the initial term of the Contract and provide an outline plan of work.</p>
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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 OWA Stage IV 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 OWA Stage IV 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.
Invitation to Tender (ITT)	The following group of documents: Description of Tender (this document); OWA Stage IV Contractors' Conditions; Tender Certificate template; Bid Price Calculation Sheet template; and Clarification Document (if applicable ²).
Main Bid Document	Has the meaning given in section 3.1. No template is provided.
Project	The Quantity and Quality of Qualified Termination SpecialistsQuantity and Quality of Qualified Termination Specialists or QQTS 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.

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

OWA	Offshore Wind Accelerator
OWA Partners	A group of leading offshore wind farm developers supporting the OWA.
OWA 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.
OWA Cost Model Input Sheet	A form (to be provided by Carbon Trust) which the Contractor should complete in WPA to provide input into the OWA Cost Model.
Scope of Work	The (preliminary) Work Programme for the Project as defined in section 4 of this document. At Contract award, the Scope of Work will be replaced by the Final Scope of Work.
Technical Working Group (TWG)	A group consisting of technical experts appointed by the OWA Partners. The TWG will supervise the Project.
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 OWA programme 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.