**INVITATION TO QUOTE**

**for the provision of**

**South West Local Net Zero Hub Programme Evaluation**

Supply the SouthWest reference number: DN 608430

Published – 19/04/2022

Submission by: 13/05/2022

Procurement LEAD – Emil Cirica (emil.cirica@westofengland-ca.gov.uk)

**West of England Combined Authority Information**

The West of England Combined Authority is creating a better, greener future for people who live and work in the region.

It is improving peoples’ lives:

* helping residents secure decent jobs and homes they can afford.
* tackling climate change and the ecological emergency.
* providing access to skills and training.
* improving transport and the places people live, work and visit.
* supporting businesses to succeed.

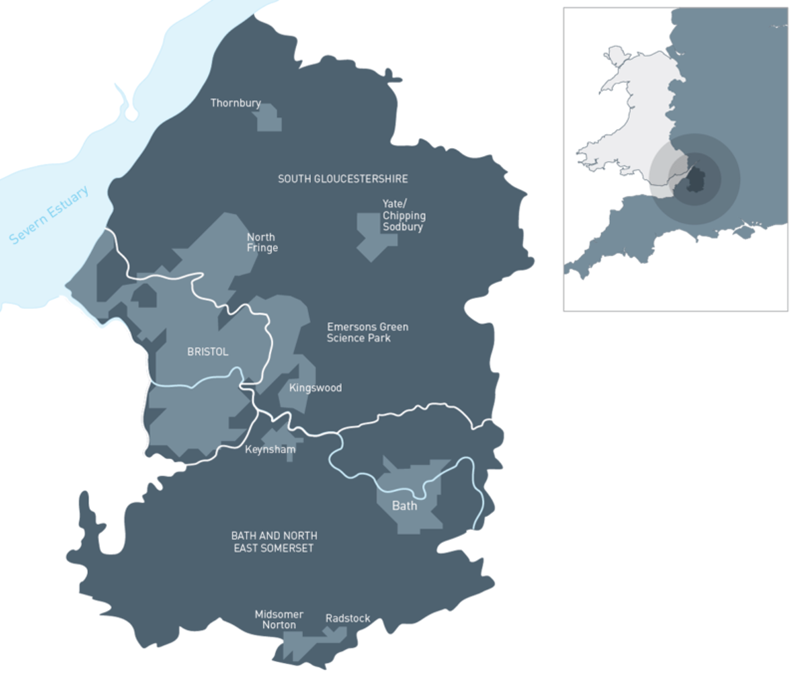
The West of England Combined Authority is creating a region to be proud of.

The West of England region:

* has a diverse population of more than 1.1million people.
* boasts a highly skilled workforce and one of the highest levels of graduates in the UK.
* is home to innovative and creative businesses
* has an economy, built on strong foundations, worth over £40bn a year.

It is a region which competes on global scale. A region where ideas flourish and businesses grow.

[www.westofengland-ca.gov.uk](http://www.westofengland-ca.gov.uk)



**Form of Quote Letter**

**Invitation to tender for: The Provision of SouthWest Local Net Zero Hub Programme Evaluation**

***Important Note: Where a Bidder is a consortium, this Form of Quote Letter must be signed by the authorised signatories of all members of the consortium. Each signatory must confirm his/her name and title as well as the full name and address of the member of the consortium on whose behalf he/she is signing.***

To: West of England Combined Authority.

We the undersigned, having read the draft Contract and Specification do hereby offer to complete the supply of services required to be performed in the carrying out of the above contract in accordance with the above documents, to the criteria as appended to this letter.

We understand that the Authority is not bound to accept the lowest or any quote and will not pay any expenses incurred by us in connection with the preparation and submission of this Tender.

We agree that my/our quotation remains open for consideration for a period of 90 days from the date fixed for submission of quotation. We declare that the insurance specified in the draft Contract is currently maintained by us.

We confirm that we have the capability and resources to meet all requirements of the draft Contract and the Specification in terms of quality, cost, and time.

Signed:

Designation:

(Duly authorised to sign tenders and give such certificate for and on behalf of:

Tenderer

Date:

Address:

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**SECTION 1 – THE REQUIREMENT**

* 1. **Introduction**

The South West Local Net Zero Hub (previously Local Energy Hub) is seeking evaluation consultants with a strong knowledge of the energy sector and local government to provide an independent evaluation of the Local Net Zero Hub Programme.

The evaluation will review delivery of the programme, its enabling activities to engage local government, business and communities and its pipeline of strategic energy projects, as well as exploring some of the opportunities, challenges and regional circumstances of each Hub to provide a nuanced understanding of impact.

The report will also make recommendations for how to best approach certain methodologies in a standardised and comparable way moving forward. These recommendations will be based on findings from the evaluation and consultation with key stakeholders, including BEIS and the Hub’s management board and governance structures, as well as learnings shared from the other Hub evaluations.

Funding for this evaluation has been provided by the Department of Business Energy and Industrial Strategy (BEIS). BEIS will be a recipient of the final outputs, along with the South West Hub Management Board, and findings will be used to inform future programme priorities and direction.

The successful provider will be required to coordinate and collaborate with other suppliers across all five Hub areas to agree a common approach and ensure a level of consistency.

**1.2 The Project scope**

## Local Net Zero Hub Programme England

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

The programme was announced in 2017 as part of the Clean Growth Strategy. Funding was provided for the creation and support for five Local Net Zero Hubs (previously known as the Local Net Zero Hubs). The Hubs were established to promote best practice and support local authorities to develop net zero projects up to the point of commercial investment.

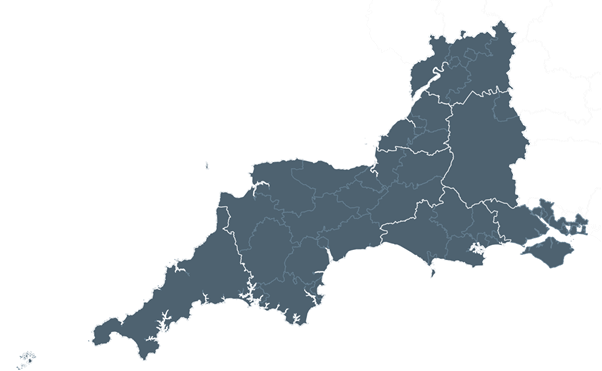
The original objectives, as set out in the Local Energy Capacity Support Memorandum of Understanding in 2017, are:

1. Increase number, quality and scale of local energy projects being delivered.
2. Raise local awareness of opportunity for and benefits of local energy investment.
3. Enable local areas to attract private and/or public finance for energy projects.
4. Identify working model for teams to be financially self-sustaining after first two years.

## SouthWest Local Net Zero Hub

The South West Local Net Zero Hub (SWNZH) is one of five Local Net Zero Hubs operational in England. SW Local Net Zero Hub is made up of seven Local Enterprise Partnership (LEPs) areas with over 40 Local Authorities of which most have declared Climate Emergencies to attain Net Zero by 2030.

The seven LEPs provide the strategic direction and governance for the SWNZH. The Accountable Body for the SWNZH is the West of England Combined Authority (WECA).

    
    
The SWNZH engages with a wide range of organisations to support the identification, development and implementation of energy projects across five regional hubs. The initiative has five core objectives aimed at stimulating local investment in energy projects.

1. Increase the number, quality and scale of local energy projects being delivered

2. Provide regional leadership, raise awareness about local energy investment opportunities and benefits; liaise with BEIS

3. Enable local areas to attract private and/or public finance for energy projects

4. Support and deliver national and local Government schemes

5. Collaboration, co-ordination and sharing of best practice

6. Identify opportunities for income to contribute to core funding

Key services and programmes

The SWNZH deliver a number of core services and programmes, including:

1. Local Capacity Support – providing resource support to public sector​
2. Rural Community Energy Fund – grants to community groups​
3. Green Homes Grant Local Authority Delivery – Housing Retrofit to EPC rated D, E , F & G​
4. Public Sector Decarbonisation – supporting wider public sector to develop net-zero organisational plans and develop investment grade proposals for funding
5. BEIS pilot projects, including Council Tax & Business Rates Pilot, Social Housing Decarbonisation Technical Pilot, COP 26 Zero Carbon Bus Tour and Regional Roadshows

**1.3 Specification**

**Please see also the Annex 1, 2, 3**

**Activity 1 – Scoping the Evaluation**

The evaluation of the programme seeks to answer key questions about programme performance that have been defined in consultation with BEIS (see activity three). An initial phase of work will gather information to inform the work, ensuring that the researcher and client have access to a shared folder of information, and government reporting trackers.

Annex One includes the KPIs by which the Hub programme has been evaluated on an ongoing basis and includes recommendations for the ways in which the consultant can gather additional supporting information. The consultant may recommend the use of additional KPIs.

The output from this initial phase of work will be a project plan for the evaluation that includes –

* A template for the final report
* A proposal for the application of the proposed methodology
* A plan for interviewing stakeholders in a systematised way
* A presentation for the hub programme management board to secure approval to proceed

**Activity 2 – National Hubs Evaluation**

The evaluation of the local Net Zero Hub will be undertaken in parallel with the evaluation of the four other Net Zero Hubs in England.

A working group will be established by the Hubs to coordinate the work of the evaluators that have been commissioned. The consultant should allocate time to participate in this group, which will meet on a fortnightly basis for the duration of the project. This group will seek to:

* Ensure that evaluation plans share the same essential components
* Identify where additional analysis by a Hub, which cover the work of all Hubs might be duplicated elsewhere
* Ensure that carbon and energy evaluation methodologies are consistent (See Annex Three)
* Report numerical findings in a format that supports comparison
* Ensure findings and learnings from other Hub evaluations are effectively understood and applied to inform recommendations

The consultant for each region will support the hub to deliver a synthesis of high-level findings.

Of particular importance is agreement and alignment of the approach to evaluating carbon and energy metrics for different types of projects. The final report will include a statement on reporting methodologies which all consultants will contribute to.

**Activity 3 – Local Net Zero Hub Programme Evaluation**

The evaluation will seek to answer these key questions:

Key Questions

1. **How many projects have been delivered? What has been the Hub’s role in facilitating delivery of these?**

Sub-questions: What is the breakdown of projects by project type (as set out under ‘category’ in the Hubs project tracker)? What is the breakdown of projects delivered per LEP? What have been the barriers and enablers to the Hub delivering projects? To what extent and how have the Hubs overcome any barriers faced? What has been the quality of these projects, e.g. have they delivered against proposed targets/outcomes?

1. **What has the Hub done to raise local awareness of the opportunity for and benefits of local energy investment? What has been the impact of this?**

Sub-questions: What is the local need and context for local energy investment? What have been the barriers and enablers to the Hubs raising local awareness? To what extent and how have the Hubs overcome any barriers faced? Has there been an increase in number/quality of project proposals since the Hubs were established, detailed by LEP area? Where local awareness is still lacking, what is being done to mitigate this?

1. **What carbon and energy savings have been achieved? To what extent and how did the Hubs contribute to this change?**

Sub-questions: How have the carbon and energy savings for projects been measured? To what extent are these methods comparable, accurate and reliable? What is a potential, standardisable and comparable approach to measure savings for future projects? What have been the barriers and enablers to the Hubs supporting and facilitating changes to emissions and cost? To what extent and how have the Hubs overcome any barriers faced?

1. **How many projects have attracted additional investment, through private, public commercial and public subsidised funding? To what extent and how did the Hubs enable this provision of additional public and private funding?**

Sub-questions: What have been the barriers and enablers to the Hubs supporting and facilitating provision of additional private funding? To what extent and how have the Hubs overcome any barriers faced to drawing in additional private funding?

1. **Which projects have supported or are supporting delivery against national targets as set out in the Net Zero Strategy the Energy White Paper, the Transport Decarbonisation Plan e.g. Net Zero by 2050, carbon budgets etc? To what extent and how are the Hubs driving forward Net Zero in their regions?**

Sub-questions: How have the Hubs aligned their priorities with targets set out by central government? How can the Hubs improve their delivery against national targets? What proportion of projects have supported delivery against national targets? What have been the barriers and enablers to the Hubs driving forward Net Zero in their regions? To what extent and how have the Hubs overcome any barriers faced?

1. **What has been the Hub’s role and impact in delivering other government programmes in addition to core activity?**

Sub-questions: What role has the hub played through direct funding delivering LAD, PSDS, Social Housing Technical Funding, RCEF, COP26? What other aspects of Government Policy has the Hub supported indirectly as an outcome of delivering projects and enabling activities? How has the core programme been impacted by this wider role? What have been the barriers to delivery of these programmes and how have the Hubs overcome these barriers?

1. **Does the Hub deliver good value for public investment (quantitative and qualitative)?**

Sub-questions: What does value look like for the Hub – how is value attributed by stakeholders? What is an appropriate methodology for calculating VfM based on factors such as Hub investment, projected value of projects delivered, average value of projects, and private/public investment leveraged (exploring deadweight and counterfactuals where these are available)? What economic outputs/outcomes can be attributed to Hub activity (include a methodology which can be applied in future)? What value can be attached to Hub enabling activities, how can this be quantified/qualified? What other aspects of added value do Hubs bring, how are these demonstrated? N.B. The methodological approach to these questions should enable a standardised local and national assessment that can be applied to future reporting.

1. **Are the hubs governance structures appropriate for their growing roles?**

Sub question: How well do local Hub governance structures reflect the strategic development of energy planning and strategy within the Hub areas? Do the boards have the appropriate authorities to make the decisions? Are the appropriate checks and balances in place to ensure proper oversight of the programme locally and nationally? In what ways might Hub governance be strengthened? Provide recommendations to ensure there is a robust governance structure for £multi-million decision making.

**Activity 4 – Net Zero Hub Recommendations**

In addition to a report answering the evaluation questions in Activity 3, the advisor will provide a forward-looking report making recommendations about the future priorities of the Net Zero Net Zero Hubs.

It is anticipated that during the course of the commission, Government will define what the future role of the Hubs will be, aligned with the Net Zero Strategy, and in relation to other regional funding such as the levelling up agenda.

This report should build on the evidence base that has been assembled, including consultation with the Net Zero Hub Board and Stakeholders to make recommendations including:

* Regional priorities for the Net Zero Hub
* Role in providing evidence to support local policy development
* Alignment with Net Zero Policy Framework
* Improvements to programme reporting
* Opportunities for working across Hub boundaries and leveraging knowledge
* Linkages and potential overlaps with other organisations delivering/influencing policy in the regions
* Gaps in regional delivery of National Programmes that future capacity could support
* Opportunities for feedback on policy delivery informing future policy design
* Future sustainability of the programme

**Activity 5 – Project Management**

The consultant will programme manage and coordinate Activities 1 – 3. This will ideally be provided by one of the team members directly supporting one of the activity areas.

* Organising and attendance at project meetings, every week on average.
* A methodology received at tender will agree a budget across activities. However, the advisors will work flexibly to adapt time committed to each activity area by +/- 10%.
* The majority of technical support activity will take place from February to June, and the programme contribution should be profiled on this basis.
* The consultant advisor should demonstrate capacity to provide adequate resources to support each of the tasks and work flexibly to short timescales.

**Project Milestones**

The commission is for 5 months of advice and programme support from March to July, with one months for financial close out. There will be intensive activity in the first three months of work so that an interim report is a substantive document containing the majority of findings.

Outputs are expected to be delivered in the following timeline: -

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **MAY** | **JUNE** | **JULY** | **AUGUST** | **SEPTEMBER** | **OCTOBER** |
| [A1] Scoping the Evaluation | Kick off | Project Plan |  |  |  |  | |
| [A2) National Evaluation | Participating in Working Group. Identifying areas for collaboration. | | Agreeing shared methodology. Updating on progress | | Final Synthesis |  |
| [A3] Programme Evaluation | Preparation and gap analysis | | Interim Report | | Final Report |  |
| [A4] Programme Management | Weekly Co-ordination Meetings,  Budget management | | | | | Financial Close |

## Outputs

**Reporting**

An interim evaluation report should be delivered halfway through the evaluation activity.

Final Research findings should be presented as a Word document, e.g. research report, with a narrative of the Hubs delivery so far and recommendations for future delivery. The report should include answers to each of the key questions and any sub-questions. The report should also include a technical report alongside the main findings, setting out methodologies used as detailed above. This would include metrics used and their format (see below for further detail).

**Carbon and Energy savings**

Across the hubs and projects there are likely to be significant gaps in data on energy and carbon savings. The output from the evaluation should be an assessment of carbon and energy savings for 1) all projects on a qualitative basis and 2) where available on a quantitative basis. A spreadsheet containing all the quantitative and qualitative data collected should be provided. There should then be an assessment as part of the main evaluation report, on the total carbon and energy savings of those projects with quantitative energy and carbon savings data. The report should also summarise the qualitative data collected on energy and carbon savings. Currently, the hubs tracker collects data on CO2 savings (tCO2/yr), lifetime of project, data quality rating (Red/Amber/Green rating for the quality of the carbon savings estimate) and comments on the source/methodology/quality (text box for any comments).

**Leverage Ratio**

The evaluation should produce the following outputs:

* A spreadsheet containing the list of projects that are considered as part of the leverage ratio calculation. Any further calculations used to estimate the leverage ratio.
* A qualitative summary in a report explaining the definition of the leverage ratio calculated
* A qualitative description in a report explaining the scope of projects included as part of the calculation. What is the minimum level of certainty on capital costs needed for a project to be included? What is the minimum level of involvement of the hubs needed for a project to be included?

**1.4 Terms of Contract**

This contract will be delivered under West of England Combined Authority terms

**1.5 Contract Award**

The approval of the award will be made by the appropriate Authority representative

**1.6 Contract Value -** £100,000

**1.7 Assessment criteria**

**Skills and Experience of Key Team Members**

Please highlight the relevant skills, experience, knowledge and qualifications of named staff who shall be involved in delivering this project with particular attention to:

* Providing full CVs (not summaries), including position within the organisation and specific relevant experience of working on similar projects
* Identifying specific roles and key assigned tasks within the project,
* Previous work on similar scope/scale independent evaluations of comparable programmes/ government funded activity
* Communication skills, including the ability to write in a concise, clear form and present to stakeholders

**Timeliness of delivery & Risk Management**

Please detail your robust and credible approach to project and risk management and how you shall ensure this project is successfully delivered within the timescales and parameters of the specification. Your response should include:

* How your proposed strategy will maximise the time and budget available
* Provision of a credible and acceptable project plan, including appended Gantt chart and work breakdown structure
* Evidence that your organisation has the capacity to mobilise quickly and complete the project within the available timescales and resources.
* Credible contingency proposals to ensure deliverability in the event of loss or absence of staff.
* How you will provide quality assurance and deal with any issues or concerns raised in the course of monitoring contract delivery

|  |  |  |
| --- | --- | --- |
| **assessment criteria** | **overall weighting** | **question** |
| **Price** | % | **20** |
| **Quality** | **%** | **80** |

**1.8** **Dates – Timetable**

|  |  |
| --- | --- |
| Request for Quotation issued/clarifications open | 19/04/22 |
| Deadline for clarification | 06/05/22 at 12:00 midday |
| Quotation Submission Deadline | 13/05/22 at 12:00 midday |
| Contract awarded | 31/05/22 |

**SECTION 2 – INSTRUCTIONS TO BIDDERS**

2.1 **E-Quote System**

The Authority uses ProContract as its e-procurement system. Assistance in relation to the e-procurement system is available to suppliers via the Supplier Help Icon within the system. Supplier Guidance documents are also available to view and download.

**Suppliers must ensure that they have the most up to date Invitation to Tender document by registering on the e-tendering system at** [**www.supplyingthesouthwest.org**](http://www.supplyingthesouthwest.com)**.uk and expressing an interest. This will enable suppliers to view the latest documents and see any comments and discussions on those documents.**

If you are still unable to resolve your issue in using the system you should send an e-mail to [ProContractsuppliers@Proactis.com](mailto:ProContractsuppliers@Proactis.com) explaining the nature of your query.

2.2 **Register Intent or opt out**

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

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

2.3 **Preparation of Quote**

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

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

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

2.4 **Pricing Schedule**

The Authority requires suppliers to complete and upload Price Schedule(s) where requested to do so within the e-procurement system.

All prices shall be in Pounds Sterling.

2.5 **Other Documents or Supporting Evidence**

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

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

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

2.6 **Submission deadline**

Suppliers are required to submit their Quote within the e-procurement system by 12:00 midday on 13/05/2022and should allow enough time to complete questions and upload documentation where requested to do so. Quotes received after the closing date will not be considered and will result in the Authority rejecting the Quote as a Fail / Non-compliant Quote. Emailed or hard copy Tenders will not be accepted.

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

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

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

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

2.7 **Quote Validity**

The Quote should remain open for acceptance for a period of 90 days. A Quote valid for a shorter period may be rejected.

2.8 **Communication**

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

2.9 **Confidentiality**

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

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

2.10 **Disclaimer**

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

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

Any resulting Contract shall be governed by English law.

2.11 **Freedom of Information Act**

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

2.12 **Transparency**

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

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

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

2.13 **Procurement Timetable**

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

PUBLISH ON 19/04/22

CLARIFICATIONS BY: 06/05/2022

SUBMISSION BY: 13/05/2022 12:00 midday

DECISION BY 25/05/2022

AWARD 31/05/2022

IMPLEMENTATION 5 months

ESTIMATED DATE CONTRACT WILL END 31/10/2022

2.14 **Required documents**

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

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

|  |  |
| --- | --- |
| **DOCUMENT TITLE** | **COMPLETE AND UPLOAD** |
| Section 1 – The Requirement including Specification |  |
| Section 2 – Instructions to Suppliers |  |
| Section 3 – Questionnaire |  |
| Section 4 – Pricing Schedule |  |
| Section 5 – Evaluation and Award |  |
| Appendix 1 – Non- Collusion Certificate |  |

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

**SECTION 3 – QUESTIONNAIRE**

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

**Notes for completion**

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

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

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

**Verification of Information Provided**

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

**Sub-contracting arrangements**

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

**Confidentiality**

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

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

**PART A – General Information**

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

**PART B – Technical Questions**

|  |  |  |
| --- | --- | --- |
| No | Question | Weighting |
| 1 | Please provide a detailed description of how your organization would develop and deliver the requirements? | 40 |
| *Please insert your response here and reference any supporting documents to Q1* | | |
| 2 | Please provide a detailed project plan for delivering work which defines the level of support  Your answer should include considerations to the following.  The support and resource that you would need the Contracting Authority to provide in helping you to deliver the outcomes. | 10 |
| *Please insert your response here and reference any supporting documents to Q2* | | |
| 3 | Please advise who within your organization would take responsibility for managing this overall requirement and the specific individuals that would lead in relation to this work and demonstrate your organization has the capacity in terms of service/product delivery.    Please provide CV’s and or information about their experience and suitability in relation to the requirements. | 25 |
|  | *Please insert your response here and reference any supporting documents to Q3* |  |
| 4 | Please provide relevant examples which demonstrate your organization has the experience and skills set out in Service requirement? | 25 |
| *Please insert your response here and reference any supporting documents to Q4* | | |

**PART C – Cost**

|  |  |  |
| --- | --- | --- |
| **Price (20%)** | | |
| No | Question | Weighting |
| 1 | Please complete Appendix A will all information requested. It is your responsibility to ensure you submit all costs to deliver your solution to meet the requirements of our specification. | [100%] |

**SECTION 4 – EVALUATION AND AWARD**

4.1 **Evaluation**

This request for quote will be evaluated as follows.

The price and quality split is detailed in the table below:

|  |  |
| --- | --- |
| **AWARD CRITERIA** | **OVERALL WEIGHTING** |
| **Price** | **20%** |
| **Quality** | **80%** |
|
|

4.2 Scoring Methodology

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

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

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

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

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

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

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

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

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

**Quality – % Total – High Best**

Quality Scores will be calculated using the following formula:

Your evaluated score (0-5) X question weighting

Sum total of your weighted score (out of 5)

Your weighted score X

Maximum score available (5)

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

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

The lowest priced bid will receive %

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

Lowest Bid Price    X (INSERT HERE % WEIGHTING)

Your Price

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

The most economically advantageous provider will be determined by the provider with the highest TOTAL SCORE. This outcome will produce the winning contractor.

4.2 **Recommendation**

An evaluation will be produced by the panel and recommendation made to award to the winning Contractor.

4.3 **Contract Award**

The approval of the award will be made by the appropriate Authority representative. The Contract award process is completed, and the procurer will debrief all suppliers in writing.

**APPENDIX 1**

**NON-COLLUSION CERTIFICATE**

I, the undersigned, in submitting the accompanying Quote to

(Name of Client)………………………………………………

………………………………………………………………………………………………

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

……………………………………………………………………………………………….

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

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

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

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

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

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

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

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

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

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

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

**APPENDIX 2**

|  |
| --- |
| **Declaration CERTIFICATE AS TO CANVASSING** |
| I/We hereby certify that I/We have not canvassed or solicited any Member, Officer or Employee of the Authority, or the Participating Authorities in connection with the acceptance of this tender or any other tender or proposed tender for the service and that no person employed by me/us or acting on my/our behalf has so acted.  I/We further hereby undertake that I/We will not in future canvass or solicit any member, officer, or employee of the Authority in connection with the award of this tender or any other tender or proposed tender for the service and that no person employed by me/us or acting on my/our behalf will so act.  Signed:  Designation:  (Duly authorised to sign tenders and give such certificate for and on behalf of :  Tenderer  Date: Address: |

# **ANNEX ONE – Hub KPIs**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Question** | **Data currently available (e.g. in Hub’s project tracker, quarterly reports etc.)** | **Analysis expected** | **Additional data needed** | **Collection methods for additional data** |
| 1 | Number of projects delivered, type of Hub involvement, location of project (LEP area), project type | Process evaluation, breakdown by LEP area, breakdown by project type | Qualitative information re. blockers to delivery of projects | Interviews with Hub managers, sample of LA reps and project leads |
| 2 | Project location (LEP area), enquiries received, engagement with LEPs | Increase in local awareness per LEP area (via number of projects brought forward each year, amount of engagement with LEPs), amount of private investment leveraged | Qualitative information re. Engagement with LEPs and understanding of benefits of local energy investment | Interviews with Hub managers, sample of LA reps and project leads |
| 3 | Carbon savings tCO2e over time (via sources Hubs have used to estimate + proxy info), type of Hub involvement | Outcomes analysis and quality assurance of savings provided + process evaluation | Qualitative information re. Hub support in overcoming blockers to deliver projects    Quantitative - Energy savings (or increase) kwh by fuel type per project | Interviews with Hub managers, sample of LA reps and project leads    Data collection form to collect energy savings data. |
| 4 | Investment and finance breakdowns | Outcomes analysis + process evaluation | Qualitative information re. Barriers to investment and Hub support in overcoming these | Interviews with Hub managers, sample of LA reps and project leads |
| 5 | Regional targets, reporting of savings, type of projects | Process evaluation | Qualitative information re. strategic support of projects to deliver against targets effectively | Interviews with Hub managers, sample of LA reps and project leads |
| 6 | Programme spend for LAD, PRS, Sustainable Warmth, PSDS and other government programmes. Value of projects, outputs and impacts for these programmes. | Impact analysis | Qualitative information re. Benefits of the Hub programme | Interviews with government programme teams, Hub managers, sample of LA reps and project leads |
| 7 | Hub funding level; Total projected and actual capital value (delivered & enabling); private and public finance raised (delivered & enabling) | Leverage ratio (calculation based on private funding raised and Hub funding level | Qualitative information re. Benefits of the Hub programme  To conduct value for money analysis, quantitative projected value of projects delivered, deadweight and counterfactual of project investments | tbd |
| 8 | Hub governance structures outline | Institutional analysis | Qualitative information on governance structures and their operation | Interviews with Hub managers, board members and LEP reps |

**Data Available**

Carbon Savings

Currently the tracker collects the following information:

* CO2 savings (tCO2/yr)
* Lifetime of project
* Data quality rating – Red/Amber/Green rating for the quality of the carbon savings estimate
* Comment on source/ methodology/ quality – Text box for any comments

Using this information collected through the tracker, it is possible to estimate lifetime carbon savings for each project as:

***CO2 savings/yr\*Lifetime of project*** *(assuming yearly CO2 savings is an average figure over the lifetime)*

Energy Savings

Currently no information on energy savings have been collected. Not all projects will have energy savings data available, for example a kgCO2e/km conversion factor could be used to estimate carbon savings from reduced road travel. Where energy savings estimates are available, it will be possible to check for consistency with the carbon savings estimates.

Capital costs

The following variables are collected on the capital costs of each project:

* Data quality rating – Red/Amber/Green rating for the quality of the capital costs estimate
* Comment on source/quality rating
* Total Capital Costs
* Split of Capital costs into potential and secured amounts. Also, this is split further into the three funding sources “Private”, “Public Finance – Central Government” and “Public Finance - LA/ LEP Finance”.

This data in combination with total level of HUB funding can be used to estimate a leverage ratio (total capital costs of projects supported by the hubs per £ of hub investment). The limitations of the data are in determining which projects have accurate capital cost estimates (would the project be cancelled or downgraded to a lower cost) and which projects are directly a result of the hubs funding.

# **ANNEX TWO – BEIS National Evaluation Methodology Requirements**

A suggested methodology is outlined below to highlight the range of methods that BEIS believe are appropriate and feasible to meet the aims set out above.

To deliver the aims set out above, it is expected that the evaluation will need to include the following workstreams:

* **Outcomes evidence reporting**: See the outcomes analysis specified in the table above. In addition to this, the analysis should include estimates of carbon and energy savings by fuel type for projects that meet the thresholds for data quality and hub involvement (as decided within the evaluation). These estimates should be collected at project level with a view to summarise at more aggregate levels (hub/region/hub programme level i.e. across England). In addition to this, the analysis should include:
  + A summary of the key factors and methods that were used to estimate carbon and energy savings across projects. For each project provide details of the specific method used to estimate carbon savings i.e. which modelling tools (such as SAP), conversion factors or other carbon factors were used.
  + A summary of the methodology used to assess carbon and energy savings quantitatively attributed to the hubs. In particular what data quality and hub involvement thresholds were considered for carbon/energy savings to be attributed to the hubs involvement. More generally the analysis should specify and describe how projects are defined. Where data analysis of carbon or energy savings is not possible (insufficient data quality) there should be explanation as to why this is the case and solutions to improve data quality in future.
  + A summary of the data quality assurance practices employed, including methodology and outcomes.
* **Process evaluation**: the process evaluation should prioritise the assessment of the Hub contribution to the outcomes achieved, such as their role in overcoming blockers to project delivery and the nature of support provided to LAs/project leads.
* **Value for money analysis**: see leverage ratio methodology below. To conduct a value for money assessment of the hub’s, a methodology will need to be devised that:
  + Can assess the quantity of projects that are forecast to be delivered
  + Assess the expected benefits of those projects in terms of carbon/energy savings and other benefits
  + Consider the deadweight, additionality and counterfactual in terms of whether those projects would have happened anyway and whether it is mobilising existing funding (not additional) vs new funding (additional). Is the hubs support enabling the project to happen that otherwise would not have.
  + Bring together costs and benefits to assess the overall social economic value of the hubs.

Data sources:

As flagged in the table above we expect the evaluation to draw on a variety of existing and new data sources to answer the research questions. We envisage that the evaluation will draw heavily on existing Hub data and a key part of the evaluation contractors’ role is to quality assure and analyse this data to answer the questions. In addition, the evaluation is likely to need to collect additional qualitative data from relevant groups via robust research methods. Interviews or focus groups with key stakeholder groups (e.g. Hub managers, LA reps, project leads) sampled in a robust and appropriate way are likely to make up most of this. Case studies could also be used.

As part of project set-up for the evaluation, an evaluation plan should be developed and agreed between the responsible owners of the evaluation and the contractor, to confirm the proposed workplan and timings.

As per the summary methodology table above, the additional data required is qualitative information on Hub performance and activity, to be collected via **interviews** with two key audiences – the **Hub managers** and a **sample of Local Authority reps/project leads**.

Data collection and analysis is required to meet a high-enough standard of quality and robustness. To meet this, evaluation contractors are expected to provide:

* Detailed consideration of the **sampling method** and **sample size** of stakeholders e.g. LA reps/project leads, including who was interviewed and how they were identified. It is expected that the contractor considers how representative the group of interviewees are and highlight the limitations and/or caveats of the sampling method where these apply.
* **Standardised research materials**, such as topic guides. It is expected that contractors use standardised data collection tools when conducting research with stakeholder groups, in this case likely to be topic guides for interviews. The content of the topic guide must be well structured, systematic and clearly relate to a defined theme or evaluation question. Transparency on and description of the topic guide themes and contents is expected from contractors when synthesizing findings.
* **Robust analysis** of existing and newly collected data, with **transparency** about any limitations or caveats about the resulting findings. It is expected that contractors take detailed notes of their analytical activities and include a detailed discussion of the methods used and any associated limitations in their write-ups.
* Reasoned and explained **synthesis** of the analysis, with conclusions linked back to the specific pieces of evidence they are based on. All findings should be clearly evidence based and the evidence behind them visible to the reader.

There are several ways in which this data could be collected and the burden shared between the hubs, contracted evaluator and project owners. A suggested approach could be the contractor sends out a data collection form to the hubs. The contractor should extract all the existing data from the tracker prior to asking the hubs for supplementary data. The hubs then complete the form, with any additional data available. This could include reaching out to individual project owners to fill out any remaining gaps in the data collection form.

Quality assurance of data

Quantitative carbon and energy estimates will need to be quality assured to provide confidence in the estimated benefits. We would expect the contractor to assess the quality of both the methods used to quantify carbon and energy savings and the estimate values themselves that they are, to a reasonable degree, consistent with external sources of data. Some suggested ways in which these figures could be quality assured include:

* Where available, checking annual energy savings and annual carbon savings are consistent i.e. apply green book [carbon factors](https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal) to reported energy savings, this should give a similar carbon savings estimate.
* Checking carbon cost effectiveness (carbon savings compared to total project capital costs) are comparable to other published sources of information.
* Checking evidence sources (such as feasibility reports) match reported carbon savings in tracker.
* Checking evidence sources are of sufficient quality for estimating impacts.
* Checking that sources for carbon factors are from reliable published sources and use the most up to date information (where this is not consistent, the carbon factors should be corrected).

The ITT should set out clearly the methods by which data collected will be quality assured including points from the list above.

**Leverage ratio methodology**

Aims

The leverage ratio should be clearly defined in a way which can link the total capital costs of projects supported by the hubs to the funding provided to the hubs. Where this is possible, this should be collected and reported both in terms of the total project costs per £ of hub funding and the total private capital raised per £ of hub funding. Below are some considerations for determining an appropriate leverage ratio.

The agreed methodology for developing the leverage ratio and how these issues are addressed should be clearly stated in the evaluation methodology and any limitations/caveats to the resulting figure clearly flagged. If each hub manages a separate evaluation then an agreed approach on the below would be required to ensure consistency:

* Should the leverage ratio take account of expected project failure? Currently the total capital costs of projects in the tracker include some projects which may fail. The leverage ratio can either be defined as total potential project value per £ of hub funding or as total project value spent per £ of funding. Given most projects are still being developed, it makes more sense to measure all the potential project capital costs. Assumptions on expected project failure can then be applied later to estimate the eventual outcome.
* What level of certainty is needed on a project for it to be included in the leverage ratio assessment? There should be a minimum level of certainty required around what the total capital costs will be. One suggestion would be to set this as projects which have at least a feasibility study, business case, financial model, strategy or other published document.
* What level of involvement in the projects is required? As a suggestion, this could include only projects where the hubs have had direct involvement or enabled them.
* What hub funding is included? A suggestion would be total hub funding excluding funding for specific programmes not captured in the tracker i.e. LAD. The guiding principle is that for all project capital costs counted for in the tracker, all the funding which has helped support those projects should also be counted.

# **ANNEX THREE – Carbon & Energy Saving Methodology**

**Carbon and Energy Savings Methodology**

Aims

This evaluation aims to collect evidence on the energy savings and carbon savings associated with projects the hubs have supported. The societal [value](https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal) of carbon and energy savings change over time and the carbon intensity of grid electricity is expected to decrease over time. The evaluation aims to understand the total lifetime carbon savings and total lifetime energy savings for projects; the specific years in which these savings are achieved is not required. However, for projects which make grid carbon intensity assumptions, the expected project start and end years would be beneficial to collect to ensure the robustness of the estimates.

Current data collected in Hub reports and analysis

Currently the tracker collects the following information:

* CO2 savings (tCO2/year)
* Lifetime of project
* Data quality rating – Red/Amber/Green rating for the quality of the carbon savings estimate
* Comment on source/ methodology/ quality – Text box for any comments

Using this information collected through the tracker, it is possible to estimate lifetime carbon savings for each project as:

***CO2 savings/year\*Lifetime of project*** *(assuming yearly CO2 savings is an average figure over the lifetime)*

The methodology used to determine carbon savings estimates currently differs across projects. Currently we understand the carbon savings provided by the Hubs use a range of methodologies. These include:

* Carbon factors applied to energy savings.
* BEIS conversion factors such as [this](https://www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2021) publication. This is useful for calculations such as expected km travelled in EV rather than petrol car.
* SAP/SBEM modelling.

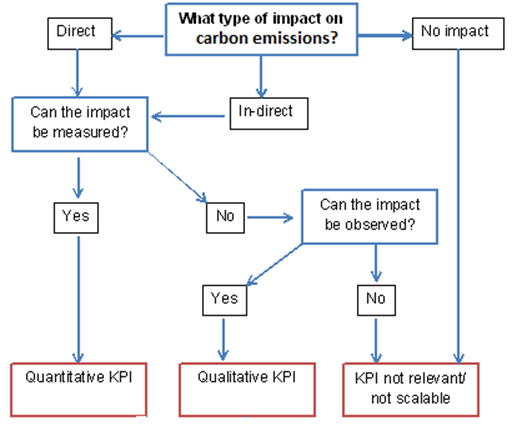
Other methodologies exist although we are still in the process of understanding what is used currently. These methodologies will vary by project as each assessment is made by a different organisation with their own preferred methodology. Not all the underlying data will necessarily be available to check.

As part of the evaluation, the contractor should set out minimum conditions for a method to be deemed suitable and verify that these are met by methodologies previously employed by the hubs. These minimum requirements should be specified in the evaluation methodology written by the contractor. For example, using HMT Green Book values for grid intensity is an appropriate method to calculate the carbon emissions from electricity use; however, where old Green Book values have been used, the contractor should adjust carbon savings to account for any changes. The contractor should also outline their approach in aggregating up carbon savings based on different methodologies.

Collecting additional data

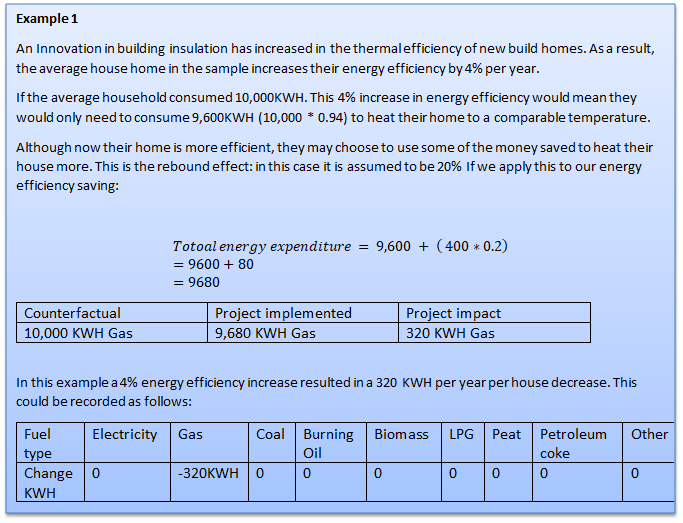
Data on energy savings is currently not collected for all projects but remain a priority for the evaluation. A potential approach for collecting energy and carbon savings (including where current estimates in the Hub tracker can be improved) data would be as follows:

1. Determine what evidence is available on a project-by-project basis. The flow diagram indicates where both quantitative and qualitative evidence should be provided and when a fallback of only qualitative evidence should be provided instead. We expect the contractor to justify the approach taken to determine which projects quantitative or qualitative evidence are collected for. Where quantitative data is of sufficient quality we would expect this to be used. Where there are substantial quality issues, we would expect a qualitative route to be taken. Currently, the hubs tracker collects data on CO2 savings (tCO2/yr), lifetime of project, data quality rating (Red/Amber/Green rating for the quality of the carbon savings estimate) and comments on the source/methodology/quality (text box for any comments):



1. Ensure that an appropriate counterfactual and policy interaction assumptions have been used and documented (may require sense checking any project reports) – see section 2 of [Valuation of energy use and greenhouse gas emissions for appraisal](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1024054/1.Valuation_of_energy_use_and_greenhouse_gas_emissions_for_appraisal_CLEAN.pdf).
2. Where possible, estimate **annual** energy use changes split by fuel type for each project and estimate **annual** carbon savings for each project (using values from the tracker where possible). The range of fuel types should be included, examples of fuel types that could be included: Electricity, Gas, Coal, Burning oil, Biomass, LPG, Peat, Petroleum coke, Other. As an example, installing a heat pump would be recorded as a reduction in gas consumption and increase electricity use.
3. Regardless of whether quantitative data is available, a qualitative score/category describing the expected impact should be collected too. An example could be – What is the project’s expected impact on carbon emissions: “Negligible effect”/ ”Some effect”/ ”Considerable effect”/ ”Paradigm shift/gamechanger”. However it may not be necessary to include the category ”Paradigm shift/gamechanger” as projects generally make use of established technologies. Each of these categories would require definitions. For example, “Paradigm shift/gamechanger” could be innovative technologies such as floating offshore wind, direct air capture, hydrogen. “Considerable” could be defined as carbon savings expected to be over a chosen threshold i.e. 500tCO2e/year. A threshold could also be applied to “Some effect” and “Negligible effect”. A further question should aim to assess how the projects reduce carbon emissions, with the answers potentially including “Low carbon generation”, “Resource efficiency”, “Carbon capture”, “Resource switching”, “Consumption reduction”.
4. For all the quantitative and qualitative data, evidence should be provided for how these have been determined.

**Energy Savings Example**



**Appendix A - PRICING SCHEDULE**

**Pricing**

Suppliers must complete the price schedule below.

All charges/prices must be in pounds sterling and should be exclusive of VAT but include all costs. All pricing information will form the basis of any resulting Contract.

|  |  |
| --- | --- |
| Section | Price |
|
| Report and presentation as detailed this invitation to quote document. | (max £100,000) |
|  |  |
| Total |  |

1. [↑](#footnote-ref-2)