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Tender

## **Local Heat and Energy Efficiency Strategies**

Scotland Excel

F02: Contract notice

Notice identifier: 2024/S 000-034637

Procurement identifier (OCID): ocds-h6vhtk-0434d0

Published 25 October 2024, 11:41am

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Scotland Excel

Renfrewshire House, Cotton Street

Paisley

PA1 1AR

#### **Email**

[construction@scotland-excel.org.uk](mailto:construction@scotland-excel.org.uk)

#### **Telephone**

+44 1414888230

#### **Country**

United Kingdom

#### **NUTS code**

UKM83 - Inverclyde, East Renfrewshire and Renfrewshire

**Internet address(es)**

Main address

<http://www.scotland-excel.org.uk>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA10383](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA10383)

**I.2) Information about joint procurement**

The contract is awarded by a central purchasing body

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

General public services

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**Section II: Object**

**II.1) Scope of the procurement**

### **II.1.1) Title**

Local Heat and Energy Efficiency Strategies

Reference number

0323

### **II.1.2) Main CPV code**

- 71314300 - Energy-efficiency consultancy services

### **II.1.3) Type of contract**

Services

### **II.1.4) Short description**

This framework has been developed to assist councils with the procurement of technical consultants for future updates to their Local Heat and Energy Efficiency Strategies (LHEES). It will also help councils complete work to meet any potential deadlines for Heat Network Zoning or Local Area Energy Plans (LAEPs). The framework is divided into three lots as follows:

-Lot 1 - Local Heat and Energy Efficiency Strategies

-Lot 2 - Heat Network Zoning

-Lot 3 - Local Area Energy Plans

Scotland Excel is the Centre of Procurement Expertise for the local government sector in Scotland. All 32 Scottish local authorities are members and circa 90 organisations are associate members. Established in 2008, our remit is to work collaboratively with members and suppliers to raise procurement standards, secure best value for customers and to improve the efficiency and effectiveness of public sector procurement in Scotland.

Scotland Excel develops and manages collaborative contracts for products, services and works where a strategic requirement is identified across our sector. For further information about our governance and set up, suppliers are referred to the following page of our website:

<https://home.scotland-excel.org.uk/about-us/our-governance/>

### **II.1.5) Estimated total value**

Value excluding VAT: £5,000,000

### **II.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for all lots

## **II.2) Description**

### **II.2.1) Title**

Local Heat and Energy Efficiency Strategies

Lot No

1

### **II.2.2) Additional CPV code(s)**

- 71315200 - Building consultancy services
- 71210000 - Advisory architectural services
- 71310000 - Consultative engineering and construction services
- 71000000 - Architectural, construction, engineering and inspection services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Various locations throughout the geographical boundaries of the participating councils within Scotland.

### **II.2.4) Description of the procurement**

The scope of this lot will include Local Heat and Energy Efficiency Strategies - Supporting local authorities in the completion of technical analysis, as well as, when directed, coordination and engagement activities necessary for the preparation and publication of Local Heat and Energy Efficiency Strategies in compliance with LHEES Order and Guidance.

### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

### **II.2.6) Estimated value**

Value excluding VAT: £4,000,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015. Please see the Invitation to Tender contained on the PCS-Tender project relevant to this procurement and the other Procurement Documents for further information.

## **II.2) Description**

### **II.2.1) Title**

Heat Network Zoning

Lot No

2

### **II.2.2) Additional CPV code(s)**

- 71314300 - Energy-efficiency consultancy services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Various locations throughout the geographical boundaries of the participating councils and associate members within Scotland.

### **II.2.4) Description of the procurement**

The scope of this lot will include heat network zoning - Assisting Local Authorities in reviewing and evaluating the potential for heat networks on a strategic, area wide scale, and to advance the development of heat network zones from this strategic level towards project identification and feasibility assessment.

### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

### **II.2.6) Estimated value**

Value excluding VAT: £750,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015. Please see the Invitation to Tender contained on the PCS-Tender project relevant to this procurement and the other Procurement Documents for further information.

## **II.2) Description**

### **II.2.1) Title**

Local Area Energy Plans

Lot No

3

### **II.2.2) Additional CPV code(s)**

- 71314300 - Energy-efficiency consultancy services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Various locations throughout the geographical boundaries of the participating councils within Scotland.

### **II.2.4) Description of the procurement**

The scope of this lot will include Local Area Energy Plans - Aiding local authorities in completing the technical analysis required for Local Area Energy Plans and/or Energy Master planning in order to achieve net-zero planning.

#### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

#### **II.2.6) Estimated value**

Value excluding VAT: £250,000

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

48

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: No

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

#### **II.2.14) Additional information**

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015. Please see the Invitation to Tender contained on the PCS-Tender project relevant to this procurement and the other Procurement Documents for further information.

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.2) Economic and financial standing**

List and brief description of selection criteria

In accordance with Regulation 59(12), as this proposed Framework Agreement is divided into Lots, these Economic and Financial Standing selection criteria apply separately in relation to each individual lot.

SPD (SCOTLAND) QUESTIONS 4B.5.1 AND 4B.5.2 - Insurance Requirements

SPD (SCOTLAND) QUESTIONS 4B.6 - Other Economic and Financial Requirement

Minimum level(s) of standards possibly required

SPD (SCOTLAND) QUESTIONS 4B.5.1 AND 4B.5.2 - INSURANCE REQUIREMENTS

Tenderers must confirm that they already have, or can commit to obtain prior to the commencement of the Framework Contract, the following types and minimum levels of insurance cover on terms compatible with the requirements of the Framework Contract:-

For all lots the following levels of Insurance are required;

EMPLOYERS LIABILITY INSURANCE to a minimum level of 10million GBP, each and every claim.

PUBLIC LIABILITY INSURANCE to a minimum level of 5million GBP for each and every claim and in the aggregate in respect of Products.

MOTOR VEHICLE INSURANCE to a minimum indemnity level of 5million GBP in respect of third party property damage/unlimited in respect of injury (where there is no company fleet and employees use their own vehicles instead, a letter signed by a person of appropriate authority confirming that the provider has ongoing arrangements in place to ensure that employees' vehicles are appropriately insured and maintained for business purposes).

PROFESSIONAL INDEMNITY INSURANCE to a minimum of 5million GBP each and every claim and in the aggregate

Tenderers must note that these minimum levels of insurance are required to be awarded onto the framework, however, the Councils may request an increase to the minimum level

of insurance cover required or request additional insurance cover when awarding a Work Order under the Framework Contract. LIMITATIONS ON LIABILITY are detailed in the published terms and conditions of Contract. FURTHER LIMITATIONS on LIABILITY ARE NOT ACCEPTED.

#### **SPD (SCOTLAND) QUESTION 4B.6 - OTHER ECONOMIC AND FINANCIAL REQUIREMENTS:**

A search of the tenderer against Equifax's ScoreCheck and Protect must not result in a "Rating", "Warning" or "Caution" return which identifies financial risk, unless the tenderer confirms that it can provide any other document which Scotland Excel considers appropriate to prove to Scotland Excel (acting within its permitted discretion under the applicable public procurement rules) that the tenderer does/would not present an unmanageable risk should it be appointed on to the proposed Framework Agreement.

#### **III.1.3) Technical and professional ability**

List and brief description of selection criteria

List and brief description of selection criteria: In accordance with Regulation 59(12), as this proposed Framework Agreement is divided into Lots, these Technical and Professional ability selection criteria apply. -SPD (Scotland) Question 4C.10 – Subcontracting -SPD (Scotland) Question 4D.1 - Quality Assurance Schemes and Health and Safety Procedures -SPD (Scotland) Question 4D.2 - Environmental Management Standards

Minimum level(s) of standards possibly required

Further to the identified selection criteria outlined above, full guidance and the minimum levels of standards required are outlined in the "0323\_III.1.3 Technical and Professional Ability" document, which can be found in the "Contract Notice" folder in the Buyer Attachment area, within ITT 51206 of project 24877.

### **III.2) Conditions related to the contract**

#### **III.2.2) Contract performance conditions**

For full details of the conditions relevant to the proposed Framework Contract and contracts to be called off thereunder (to the extent known or settled at this stage), please see the tender documents (details of how to access these are set out in section "I.3, Communication" of this Contract Notice).

Scotland Excel will require the members of any tendering group of entities (including, but not limited to consortium members, members of a group of economic operators and/or sub-contractors) to be jointly and severally liable for the performance of the contract (no

matter the legal form taken by those entities in order to enter into the contract).

For further information relative to the submission of consortia tenders, tenders by groups of economic operators and sub-contracting, please refer to the tender documentation which is available in the relevant PCS-T project for this procurement exercise.

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 15

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: Yes

### **IV.2) Administrative information**

#### **IV.2.1) Previous publication concerning this procedure**

Notice number: [2024/S 000-002701](#)

#### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

25 November 2024

Local time

12:00pm

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.7) Conditions for opening of tenders**

Date

25 November 2024

Local time

12:00pm

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### **Section VI. Complementary information**

#### **VI.1) Information about recurrence**

This is a recurrent procurement: No

#### **VI.2) Information about electronic workflows**

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

#### **VI.3) Additional information**

Scotland Excel is a central purchasing body and is procuring this framework on behalf of the following contracting authorities (and successor bodies):

A) The 32 local authorities in Scotland as listed at <http://www.scotland-excel.org.uk/home/aboutus/ourmembers.aspx>

B) Scotland Excel associate members as listed at <http://www.scotland-excel.org.uk/home/Aboutus/Ourmembers/Associate-members.aspx>

C) any Integration Authority, or other body, established pursuant to the Public Bodies (Joint Working)(Scotland)Act 2014.

D) Any Scottish Registered Social Landlords listed on the public register of the Scottish Housing Regulator:  
<http://directory.scottishhousingregulator.gov.uk/Documents/Landlord%20Register.pdf> as

at the date of publication of this notice.

E) Tayside Contracts

F) Advanced Procurement for Universities and Colleges (APUC Ltd) and their member organisations across the higher and further

education sector in Scotland and their associated and affiliated bodies.

G) Scottish Prison Service (SPS)

H) Any body created pursuant to the National Health Service Scotland Act (1978)

I) Transport Scotland

J) Scottish Government and Scottish Central Government Bodies.

The above is subject to each contracting authority entering into and maintaining a relevant membership agreement or other access agreement with Scotland Excel.

Retrospective rebates apply to this framework. For further details, please see the (0323) Framework Contract document.

Tenderers are advised that the envisaged maximum number of participants that might be appointed to the proposed framework agreement set out in section IV.1.3 of this contract notice is purely indicative. Scotland Excel reserves the right to appoint more or less bidders than the envisaged maximum number to the proposed framework agreement.

Further information regarding the operation of the framework and the tendering requirements can be found within the tender documentation which is available in the relevant PCS-T project for this procurement exercise.

The buyer is using PCS-Tender to conduct this ITT exercise. The Project code is 24877. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

A sub-contract clause has been included in this contract. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2363>

Community benefits are included in this requirement. For more information see:

<https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

Tenderers are requested to agree to the community benefits approach as set out in the ITT. Where agreed, if successful in award onto the

framework and if a Work Order is awarded through the framework, consultants will be required to:

1. Upon award of the Work Order proactively engage with the Council to agree the selection of community benefit outcomes and how these will be monitored between the parties (including reporting and reviews).
2. Commence implementing the community benefits immediately, or as soon as reasonably possible, upon being appointed a Work Order.
3. Inform Scotland Excel of the selection of community benefit outcomes which have been agreed with the Council and report on the delivery these on a bi-annual basis in a format prescribed by Scotland Excel.

(SC Ref:756763)

#### **VI.4) Procedures for review**

##### **VI.4.1) Review body**

Court of Session

Parliament Square

Edinburgh

EH1 1RQ

Country

United Kingdom