**INVITATION TO TENDER**

**for the provision of**

PCC - PCH Heat Decarbonisation Options

**Published** – 30/06/2025

**Submission by:** 15:00 on **11/08/2025**

**Client Lead:** Mark Burton

**Procurement Lead:** Sandyp Singh

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**SOUTH WEST NET ZERO HUB** ([www.swnetzerohub.org.uk](http://www.swnetzerohub.org.uk/))

The South West Net Zero Hub (the SWNZH) is an initiative funded by the Department for Energy Security and Net Zero (DESNZ). The purpose of the Hub is to provide impartial advice, technical support and funding to public and not-for-profit organisations, to develop projects that accelerate emission reductions and enable the transition to a more sustainable future.

The Hub is one of five Local Net Zero Hubs operational in England and it collaborates with over 30 Local Authorities across the wider southwest from Swindon to the Isles of Scilly. The Hub works with the Local Authorities and other partners to engage with a wide range of public sector organisations and to bring forward business cases that can attract investment in energy infrastructure.

As well as providing support to regional energy projects, we deliver large-scale programmes such as domestic retrofit and support to public sector decarbonisation schemes. We also support community energy projects and share best practice and innovation across the region.

Objectives of the Hub:

1. To attract commercial investment and help Local Authorities and other local public sector bodies to develop investment models which accelerate progress to net zero.
2. To increase the number, quality, and scale of local net zero projects being delivered across the region in line with national targets and strategies, including supporting the early-stage development and delivery of projects.
3. To collaborate with the Department for Energy Security and Net Zero to develop and support net zero elements of wider programmes and initiatives delivered across England.
4. To support a national knowledge transfer programme to improve information sharing, training, and evaluation.
5. To raise local awareness of opportunities for and benefits of local net zero investment.

The Accountable Body for the Hub is the West of England Mayoral Combined Authority – this tender competition is being run by staff representing the SWNZH within the Combined Authority. The Client to the Contract is therefore the Combined Authority; specifically, the SWNZH project manager.

# WEST OF ENGLAND MAYORAL COMBINED AUTHORITY

The West of England is an economic leader with an economy worth over £33 billion a year. With a population of over 1.1 million people, one of the highest rates of employment in the country, and over 45,000 businesses, the region competes on a global scale. The West of England is a place where highly skilled people work, where ideas flourish, and where businesses grow. It’s also a place that a diverse population of people call home.

The Mayoral Combined Authority was formed in 2017, to champion the region and drive clean and inclusive economic growth. As a result, significant powers and funding have been transferred to the region through the Mayoral Combined Authority and West of England Mayor. Our aim is to deliver economic growth for the region and address some of our challenges, such as productivity and skills, housing and transport.

The Mayoral Combined Authority is made up of three of the local authorities in the region – Bath & North East Somerset, Bristol and South Gloucestershire. Building on a strong track record of partnership working in the region, the West of England Mayoral Combined Authority continues to work closely with North Somerset Council. The Mayoral Combined Authority also the accountable body for the West of England Local Enterprise Partnership.



# THE REQUIREMENT

# Introduction

The South West Net Zero Hub (SWNZH) is supporting Plymouth City Council (PCC) in its work with Plymouth Community Homes (PCH) seeking to understand the heat decarbonisation options for PCH’s most common building typologies.

This tender specification outlines the requirements for a comprehensive study to assess the technical options, capital cost implications, and investment options for various residential block typologies within PCH’s housing stock. The study will provide a detailed options appraisal of connecting to different heating solutions, including the feasibility of connecting PCH’s residential blocks to the city’s planned heat networks, which are a strategic priority for PCC in meeting its pledge for a carbon neutral city.

The study will provide sufficient detail to enable evidence-based decisions for investment and grant funding for PCH going forward, as well as add to the data bank of feasible heat network connections.

The outputs will also support an understanding of heat decarbonisation options for residential blocks beyond those specifically assessed in this study.

# Background

**Plymouth City Council** (PCC)

PCC declared a climate emergency in March 2019 and pledged to make Plymouth carbon neutral by 2030[[1]](#footnote-2). Providing heating and hot water to buildings constitutes 28% of Plymouth’s carbon emissions. Consequently, PCC is committed to the long-term delivery of a heat network across the city of Plymouth in order to achieve its decarbonisation goals and help Plymouth to become a sustainable, healthy and prosperous city.

Plymouth is one project of several heat network opportunities that form the Advanced Zoning Programme (AZP), designed to bring 10-15 heat network projects to market in advance of heat network zoning regulations coming into force in 2025. A reference scheme for the city centre heat network has now been outlined, with the network to be delivered in a phased approach. The core of the Phase 1 scheme will interconnect three existing and planned heat networks in the city centre to a South West Water treatment plant via a 5G ambient spine, connecting direct to buildings or to secondary 4G energy centres as appropriate. PCC is seeking a commercial partner to deliver, own and operate the heat network. The network will be 100% commercially owned under a Golden Share model, with PCC retaining oversight under the Shareholders Agreement, and will come under Regulation with Ofgem already appointed to the role.

**Plymouth Community Homes** (PCH)

PCH, previously owned by PCC, is Plymouth’s largest social housing provider, with over 16,000 properties in Plymouth. Nationally, social housing providers have responsibility for 4.0 million households, 17% of all households in England. In 2022, emissions from residential buildings accounted for 20% of greenhouse gas emissions in the UK.

The previous government committed £3.8bn to a Social Housing Decarbonisation Fund (SHDF) over a 10-year period, with the aim to upgrade a significant amount of the social housing stock currently below EPC rating C up to that standard. The ambition will continue under the new government with the Warm Homes: Social Housing Fund (SHF).

PCH, in its Environmental Strategy[[2]](#footnote-3), has committed to “Develop and implement a robust asset management strategy that includes achieving a minimum C energy rating by 2030 for the homes and net carbon zero by 2050.” The current priority is on the 2030 target, and this short-term focus could lead to widespread replacement of gas boilers rather than the implementation of lower carbon but more complex heat decarbonisation options.  This study will assess those options and guide PCH towards an optimum long term decarbonisation pathway, from which it can apply for funding.

#  Project Summary

PCH’s domestic housing stock includes four common block types repeated across the city. These buildings, many located in Plymouth’s heat network zone, are coming up for renewal of their heating systems. Existing systems are mainly individual combi gas boilers. PCH and PCC seek to better understand potential heat decarbonisation pathways for these homes.

For each of the four common block types, the study will make a technical assessment identifying any significant technical barriers, of implementing the following low carbon heating technologies:

* Connect to an ambient 5G district heat network directly or through a 4G energy centre
* Ground-Source Heat Pump array
* Air-Source Heat Pumps

The assessment of each technology will include the two options of using a centralised plant to heat the entire building or utilising individual heat pumps in each flat.

The study will then make a financial assessment, comparing each of the above options with business-as-usual gas boiler replacement, in respect of: Estimate of capex costs; Estimate of maintenance and opex costs; Estimate of tenant fuel costs to 2050; Cashflow analysis, economic indicators (NPV, IRR, payback) and funding requirements; GHG emissions to 2050 and the cost of carbon; change to EPC rating and SAP assessment brought about by the installations. Tenant engagement, training and behaviour will also be assessed to inform the likelihood of the solutions success.

The study will result in recommended heat decarbonisation pathways for each block type, inside and outside heat network zones.

**1.3.1 Required Outcomes**

1. Following the study PCH will have the required information to make a decision on the heat decarbonisation pathway for its residential block types, including technical, economic, and investment considerations. The assessment must be specific to PCH residential block types and reflect what is genuinely deliverable, rather than being generic of the technologies available.
2. PCC will understand the feasibility and capital costs of the PCH blocks connecting to Plymouth heat networks, including details of associated works within and without the blocks to achieve this solution. The study will inform the modelling of the heat network connections and discussions with potential commercial partners.
3. The study will demonstrate a methodology and learning that supports a good understanding of the heat decarbonisation pathway for residential blocks beyond those specifically assessed in this study.

# Detailed Scope of Work

**1.4.1 Buildings within Scope:**

The study specification will be carried out for each of four common types of residential blocks, as detailed below:

**PCH residential block typologies:**

Traditional (K/L type) block

Easiform block (series 6771)

Star design block

High rise tower block

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Block Type** | **Number of dwellings** | **Usual Dwellings per block (and range)** | **Number of blocks** | **Number of blocks in Heat Network Zone** | **Average annual emissions per dwelling (tCO2e)** | **Total emissions of blocks****(tCO2e)** |
| K/L type block | 490 | 24 (12-40) | 23 | 14 | 1.8 | 635 |
| Easiform blocks (s6771) | 430 | 6 | 73 | 24 | 2.1 | 888 |
| Star design block | 546 | 12 | 46 | 44 | 2.3 | 1,274 |
| High rise MS | 317 | 84 (66-84) | 4 | 3 | 1.7 | 534 |
| Total | 1,783 |  | 146 | 85 |  | 3,331 |

**1.4.2 Data Collection:**

The successful Supplier will prepare and issue a Request for Information to PCH and PCC for the data required to successfully complete the study. Both organisations are invested in the project and have committed to providing the necessary information.

It is expected that PCH will provide:

* Information on each block including its address and location (mapped on GIS), the number of flats in each block and their characteristics.
* For each flat in each block:
	+ EPC data
	+ boiler age, and capacity
	+ energy consumption data
	+ Any/all planned changes to the fabric
* Typical layout and structural drawings for each typology, and heating and hot water schematics for flat types.
* The economic and funding assumptions to be used in the study.

It is expected that PCC will provide:

* Heat network zoning areas.
* Heat network feasibility studies covering the areas of the city where the blocks are located.
* Proposed commercial arrangements for heat network construction and operation.
* The heat network assumptions to be used in the study including connection charges and heat costs.

**1.4.3 Scope of work**

The scope of the study is to provide a detailed options appraisal which will:

1. **Create block archetypes**Assess the building data provided and construct a single typical block for each block type, to be used in modelling.
2. **Technical Assessment**
Carry out a technical assessment of how each of the following low carbon heating options (LCHOs) could be implemented for each of the 4 block types.:
	1. Connect to a heat network, either a 5G ambient heat network or a 4G heat network connection.
	2. Ground-Source Heat Pump array
		1. To include the type, number and depth of boreholes required and the space required for the borehole arrays.
		2. Assessment of the space around each individual block and identify those where there is insufficient space to implement this option.
	3. Air-Source Heat Pumps

The assessment of each low carbon heating option will include:

1. The alternatives of using a centralised plant to heat the entire building or utilising individual heat pumps in each flat.
2. Heat demand modelling and load duration curves.
3. Early-stage design specification, including how water supply, sufficient to undertake the economic assessment.
4. Identification of any significant potential technical barriers to implementation, for example spatial, structural, M&E, electrical supply capacities etc.
5. Referenced evidence and commentary on the pros and cons of the LCHO.
6. **Economic Assessment**
Based on the technical assessments, assuming capital works begin at the start of 2027, and with comparison against business-as-usual gas boiler replacement, for each of the LCHOs for each block type:
	1. Estimate the capex costs, together with phasing of installation.
	2. Estimate the maintenance and opex costs to 2050, and through at least one equipment replacement cycle.
	3. Estimate tenant fuel costs to 2050, including a scenario considering the impact from potential government policies that could affect electricity prices, such as a rebalancing of green levies towards gas or zonal pricing.
	4. Provide cash flow analysis to 2050 and report on the resulting economic indicators (NPV, IRR, payback), and identify funding requirements.
	5. Calculate the GHG emissions to 2050 and the cost of carbon for each option, to include an estimate of the embodied carbon of implementation.
	6. Assess the change to EPC rating and SAP assessment brought about by the installations.
	7. Assess the impact of the block types being inside or outside a heat network zone (HNZ) on all of the metrics above.
7. **User Behaviour**
Undertake sensitivities in the assessments based on how tenants may engage and use their heating and hot water for each LCHO, including:
	1. Drawing on a relevant evidence base or case studies
	2. Assessing the implications this may have on the costs for tenants.
	3. Estimating the amount and cost of tenant user training required.
	4. The need for, and cost, of tenant energy use monitoring.
8. **Ownership and Roles**
Assess and provide commentary on the appropriate ownership and operations roles for tenants and leaseholders, PCH, heat network providers and any other stakeholders involved in the solutions, drawing on case studies to support the assessment.
9. **Recommendations**
	1. Use the results above to recommend the preferred LCHO pathway (accounting for environmental, performance, economic and tenant impacts) for each block type inside and outside the city’s heat network zones.
	2. Apply the recommended solutions to the PCH housing stock across the city to estimate the overall impact.
10. **Investment and Delivery Options**
Assess the investment and delivery options to implement the recommended pathways across the PCH stock of residential blocks.
11. **Dissemination**
Produce a short Guide to Residential Block Heat Decarbonisation, containing a methodology, assumptions, and rules of thumb to share with other social housing providers.

**1.4.4 Outputs**

All draft and final outputs will be reviewed by the SWNZH, PCC and PCH and will only be signed off when the SWNZH are satisfied that any comments identified have been adequately addressed.

The outputs should align with the specification above and should be delivered as follows:

a. A fully referenced final report (in both PDF and MS Word format) covering the above required assessments and recommendations for the heat decarbonisation of PCH residential blocks. This should include all technical model inputs, key assumptions with data sources and detailed output data, provided as separate MS Excel sheets, to allow unlicenced use by SWNZH and any future appointed parties.

b. A standalone Executive Summary to include:

* A description of the project and methodology.
* A summary of the results of the technical assessments for each block type and each LCHO, with a comparison of the pros and cons of each.
* A summary of the economic assessment for each block type and each LCHO.
* Recommendations of the preferred LCHO for each block type, inside and outside of heat network zones.
* Recommendations of investment and delivery options for the preferred LCHOs across the PCH stock.

**1.4.5 Contract Management**

The Accountable Body for the SWNZH is the West of England Combined Authority – this tender competition is being run by staff representing the Hub within the Combined Authority.

It is anticipated that the project will be completed within five months of the start date. A draft report will be required within four months of the start date.

The project will be managed on the Client side by a Project Manager in the SWNZH with input from PCC and PCH at key decision points:

* SWNZH Project Manager – first point of contact and contract manager.
* PCC – providing data, key decisions, output reviews.
* PCH – providing data, investment criteria and prioritisation, key decisions, output reviews.

The Supplier’s project manager will be responsible for day-to-day contact with the SWNZH.

The SWNZH will be the first point of contact for engagement with stakeholders. Any planned communication with stakeholders should, in the first instance, be discussed and agreed with the SWNZH project manager.

* The minimum requirements for meetings and reporting are as follows:
* Project inception meeting
* Fortnightly progress update meetings with the Supplier’s project manager and key project team (where relevant) – via MS Teams
* Draft final report presentation to SWNZH, PCC, PCH and discussion
* Final report sign-off and project close

**1.4.6 Project Management**

The Supplier’s project management approach should be consistent with Prince 2 or other recognised project management methodology and be clearly detailed and presented.

The Supplier’s project manager should have demonstrable experience of building decarbonisation projects and the technological solutions to be assessed.

All staff working on the project should be named along with their roles, responsibilities, allocated tasks and hours.  Accompanying CVs for all staff working on the project should be provided, evidencing significant experience relevant to their project role.

The Supplier’s approach to performance monitoring of the delivery of this study must be clearly presented within tender responses.

As part of your tender return, please also provide a detailed price schedule and Gantt chart breaking down proposed project activities.

# Terms of Contract

Delivered according to the **MCA Contract Terms & Conditions (Appendix B)**. Please note that by submitting a bid you acknowledge that the authority’s terms and conditions will apply and are mandatory. Please note the contract is non-negotiable i.e. no amendments will be allowed to the contract**.** As payments are issued from a public fund, all intellectual property arising from the contract scope shall give the full rights to authority to use the outcome deliverables from the project including the submitted bid.

# Contract Value

The indicative budget range available for this project is between **£30,000 - £50,000** inclusive of all fees, expenses and exclusive of VAT, if this is expected to be insufficient, please advise via clarification.

# INSTRUCTIONS TO BIDDERS

## E-Tender System

The Mayoral Combined Authority uses ATAMIS 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** <https://weca-atamis.my.site.com/s/Welcome> **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 contact Atamis Support via the Help section of the portal explaining the nature of your query.

## Register Intent or opt out

Once the Tender Information has been viewed suppliers will be able to “Register Interest” 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 Tender and not interested in proceeding, then they can decline the opportunity.

## Preparation of Tender

Suppliers must obtain for themselves all information necessary for the preparation of their Tender response and all costs, expenses and liabilities incurred by the supplier in connection with the preparation and submission of the Tender 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 Tender. 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.

## Pricing Schedule

As part of your return in response to the ITT please provide a breakdown of how you expect to allocate your proposed budget (in pounds sterling (£s) between your partners (staff)/subcontractors (if any) and assigned by deliverable element(s) you are proposing by completing **Appendix A – Pricing Schedule.**

Please note that these prices should be exclusive of VAT.

## 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 Tender, 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

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

## Submission Deadline

Suppliers are required to submit their Tender within the e-procurement system by **the date and time quoted in the indictive timetable in section 2.13 below** and you should allow enough time to complete the questions and upload documentation where requested to do so. Tenders received after the closing date will not be considered and will result in the Authority rejecting the Tender as a Fail / Non-compliant Tender. 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 Tender 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 Tender. However, the Authority is not obliged to make such requests.

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

## Tender Validity

The Tender should remain open for acceptance for a period of 60 days. A Tender valid for a shorter period may be rejected.

## 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.

## 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 Tender response, such as professional advisors or joint bidders.

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

## 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 ITT; or
* accepts any responsibility for the information contained in the ITT 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.

## 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 Tender 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.

## 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%3A/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.

## 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 | 30/06/2025 |
| Clarifications received by: 12:00hrs (noon) | 14/07/2025 |
| Clarifications responded by | 21/07/2025 |
| Submissions by: 12:00hrs (noon) | 11/08/2025 |
| Evaluation Period | 25/08/2025 |
| Award Recommendation Report | 01/09/2025 |
| Standstill Period | 02/09/2025 – 12/09/2025 |
| Contract Award | 15/09/2025 |
| Contract starts | 22/09/2025 |

## 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 RETURN** |
| Section 1 - The Requirement including Specification | [ ]  |
| Section 2 - Instructions to Suppliers | [ ]  |
| Section 3 - Questionnaire | [x]  |
| Section 4 - Evaluation | [ ]  |
| Appendix 1: Non-Collusion Certificate | [x]  |
| Appendix A: Pricing Schedule | [x]  |
| Appendix B: MCA Low-Value Service Terms & Conditions | [ ]  |

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

# QUESTIONNAIRE

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

1.

## 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 Tender 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 Tender 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.

## Questionnaire (General Information)

|  |
| --- |
| **Contact details** |
| Supplier contact details for enquiries  |
| Name |  |
| Postal address |  |
| Phone |  |
| Mobile |  |
| E-mail |  |

|  |  |
| --- | --- |
| Registered company/charity number |  |
| Registered VAT 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) [[3]](#footnote-4) | ▢ 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 |  |

**CREDIT REFERENCE CHECK DECLARATION**

As part of due diligence, a business credit score will be obtained from a credit reference agency, and by signing this declaration you consent for a credit reference check to be carried out on your organisation by a third party which will leave a footprint on your organisation credit file.

I declare I consent for a credit search to be carried out on our organisation.

**Name:**

**Position:**

**Signature:**

**Date:**

# EVALUATION AND AWARD

Tenders will be evaluated to find the most suitable supplier who can meet the Specification and provide competitiveness of price. The award will be based on the evaluation criteria as outlined in the table below.

Upon acceptance of the Tender, the Contract shall be formed and become binding on both parties. Suppliers must not undertake work without written notification that they have been awarded a Contract and are required to start work.

Suppliers should note that the Authority reserves the right to terminate this procedure without any decision to award and will not be liable for any costs incurred by suppliers in developing their Tender.

Suppliers should also note that, should they be successful the Authority reserves the right to terminate the Contract, if at any time it is discovered that the supplier made any material misrepresentation and/or have not notified to the Authority about any material changes in relation to the information provided in the Tender.

1.

## Evaluation

This request for Tender will be evaluated as follows.

|  |
| --- |
| **AWARD CRITERIA & WEIGHTINGS** |
| **Price** | 30% | **Total Price on the pricing schedule – 30%** |
| **Quality** | 70% | Question 1 – Methodology - 27%Question 2 – Relevant expertise and experience - 20%Question 3 – Project plan - 13%Question 4 – Social & Environmental value – 10% |

The quality questions that you are expected to respond to in your proposal are detailed in the table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **No** | **Question** | **Evaluation Criteria** | **Weighting** |
| 1 | **Methodology**Please detail your proposed methodology for successfully delivering the project, covering the requirements and detail of the specification.**Response Limit:** **Four sides of A4**  | Demonstrate a clear understanding of the aims, objectives, scope of study and local circumstances.Provision of a detailed, robust, and credible methodology, with a clear breakdown of approach to meet each of the key tasks outlined in the Scope of Works, within set timescales.Description of key risks and barriers to successful delivery of the required outcomes with steps to mitigate these risks. Description of additional tasks, or technologies that could be included that would add value to the project outcomes. | 27% |
| 2 | **Relevant expertise and experience** Named staff members should have direct experience of working on comparable building decarbonisation studies, including experience of:* All the technologies outlined in the specification, including heat network connection.
* Economic assessment and financial modelling.
* Investment and delivery options.

 **Response Limit:*** **Four sides of A4**
* **Three case studies at two sides of A4 each**

**CVs two sides of A4 per person** | Clear demonstration that the project team has direct relevant experience, including:* Details of named staff allocated to deliver the scope of works, including: name, position, specific project roles, key assigned tasks, and specific relevant experience. (Please append full CV’s of all named staff to your submission)
* The number of hours and charge-out rates shall be provided for each staff member working on the project.
* Credible contingency proposals to ensure deliverability of the proposed programme to timescale and budget in the event of loss or absence of staff.
* Experience delivering at least three similar projects over the last three years to timescale, budget, and Client requirements.

(NB: the allocated hours/costs per individual staff member may vary during the delivery of the project, but the overall cost submitted, and the assessment of individual staff allocations is at the Supplier’s risk if subsequently deemed by the Supplier to be insufficient to meet this specification. For the avoidance of doubt the Suppliers fee will not exceed the tendered amount under any circumstance except where the Client instructs a variation to this scope of works).  | 20% |
| 3 | **Project Plan** Please provide an indicative timeline/project plan for completing the work by the indicated deadline, including: Please provide your approach toProject Management, including:* Team structure
* Approach to fostering collaboration.
* Risk management
* Identify the key delivery risks and how these will be mitigated/managed.

**Response Limit:** * **Two sides of A4**

**Project plan / programme one side of A3** | Clarity and robustness of the plan to achieve the required outcomes in time and on budget, including:* A credible and acceptable project programme and associated Gantt chart showing tasks and milestones.
* Risk assessment.
* Staff allocation, including days allocated across team members and associated costings.

Clarity and robustness of proposals for the project management and quality assurance approach to be adopted, including:* Team structure / Organogram
* Stakeholder engagement and collaboration.
* Risk management

Dealing with Client’s issues and concerns. | 13% |
| 4 | **Social & Environmental Value**Demonstrate how your company will create additional social value through delivery of the contract. and in its operations and corporate commitments and practices. Corporate carbon reduction commitments and activities.**Response Limit:** * **One side of A4.**
 | Specific, measurable and credible proposals to create social value through the delivery of this Contract.Evidence of company climate commitments and activities. | 10% |

## 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 may 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 Advantageous Tender (MAT) MAT which is the combination of both the Quality and Cost scores. The highest scoring bidder will be recommended for the award of contract.

**Quality – 70% 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 – 30% 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 30%

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

Lowest Bid Price    X 30

Your Price

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

The most economically advantageous proposal will be determined by the evaluation with the highest TOTAL SCORE. This outcome will produce the preferred supplier.

## Contract Award

The approval of the award will be made by the appropriate Authority representative, who will also debrief all suppliers in writing.

# APPENDIX 1: NON-COLLUSION CERTIFICATE

I, the undersigned, in submitting the accompanying Tender to

(Name of Client)………………………………………………

………………………………………………………………………………………………

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

……………………………………………………………………………………………….

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

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

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

2) the amount of this Tender 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 Tender;

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 Tender or who is qualified to submit a Tender in response to this request for Tender, 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:.........................................

1. https://www.plymouth.gov.uk/climate-emergency [↑](#footnote-ref-2)
2. [PCH Environmental Strategy](https://eur03.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.plymouthcommunityhomes.co.uk%2Fmedia%2Fqdlpy4ei%2Fenvironmental-strategy-2021-2026.pdf&data=05%7C02%7CA.D.S.Norton%40exeter.ac.uk%7Cc764aade092047e478b308dd319c43a2%7C912a5d77fb984eeeaf321334d8f04a53%7C0%7C0%7C638721269709198823%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=OKdIdQNOLeIPNzbwweyxeOdcV%2BlWAYDzxCI%2FnVSADPo%3D&reserved=0) [↑](#footnote-ref-3)
3. [↑](#footnote-ref-4)