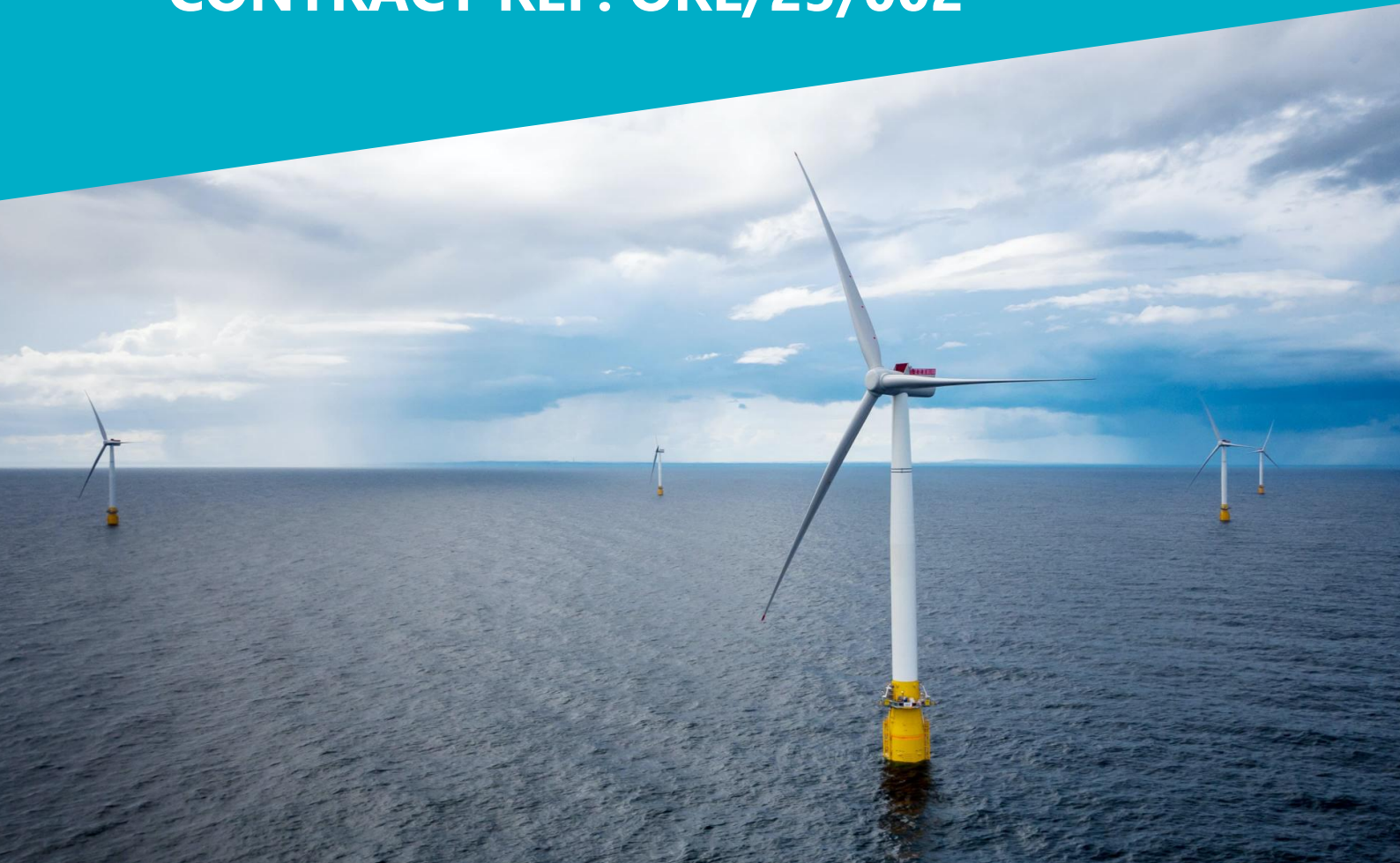


# F4OR Consultancy Services Framework CONTRACT REF: ORE/25/002



## INVITATION TO TENDER

Author	Rachel Douglas
Date	26 <sup>th</sup> August 2025

**SUBMISSION NO LATER THAN: 14:00:00 ON Tuesday 23<sup>rd</sup> September 2025**

Deadline dates and times are strict; late submissions will NOT be accepted.

Unsigned or incorrectly signed submissions will be regarded as a non-compliant application and therefore rejected.

Suppliers may also be rejected if they do not provide a complete response to this invitation to tender.

## DOCUMENT HISTORY

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Revision	Date	Prepared by	Checked by	Approved by	Revision History
1	16/07/2025	Rachel Douglas Davood Sabaei	Craig Corbett	Craig Corbett	final

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# 1 INTRODUCTION & BACKGROUND

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## 1.1 Introduction

You are hereby invited by the Offshore Renewable Energy Catapult (ORE Catapult) to quote for provision of the Service(s) as described in [Section 5](#) below.

As a private sector organisation that receives funding from a public authority, it may be a requirement as part of a grant funding agreement, to comply with the Procurement Act 2023 for some of its requirements. Therefore, this Invitation to Tender ("ITT") has been issued by ORE Catapult as part of an "Open" competitive procurement exercise in accordance with the "Open" procedure for tendering under the Procurement Act 2023 (as amended from time to time).

All personal information or personal data supplied in relation to this tender will be treated as confidential. It will also be subject to the General Data Protection Regulation [EU] 2016/679 ("GDPR"). ORE Catapult will request personal information or personal data for the purposes of this tender where we have a legitimate interest in doing so in order to assess whether the Tenderer meets the requirements.

## 1.2 What is a Framework Agreement?

A framework agreement is an agreement or other arrangement between one or more buying authorities and one or more suppliers which establishes the terms (in particular the terms as to price and, where appropriate, quantity) under which the supplier will enter into one or more contracts with ORE Catapult in the period during which the framework agreement applies.

The value of the framework is the estimated value of all contracts envisaged to be awarded under the agreement during its duration.

Frameworks do not in themselves create any contractual obligations, whereas a call-off does. In placing a call-off contract with a supplier from a framework, ORE Catapult will be making a commitment to purchase the specified services from that supplier.

## 1.3 Type of Framework Agreement

The F4OR Consultancy Services will be a multi-supplier Framework Agreement split into the following two (2) lots:

- Lot 1 – Sector Specific
- Lot 2 – Business Excellence

Tenderers are required to indicate, on the Tender Declaration included within Appendix 2 of this ITT, the Lot(s) for which they have applied. Submissions shall be accepted for any one or both Lots.

## 1.4 Background

### 1.4.1 Catapults

The Catapults are elite technology and innovation centres established by the UK Government (through Innovate UK) in high growth industries and are designed to bridge the gap between Government, universities, research institutions and innovative businesses of all sizes. Their objective is to transform great research rapidly into commercial success to support the industry and to generate economic growth. Catapults represent a long-term strategic investment by Innovate UK in the UK's innovation capability.

### 1.4.2 Offshore Renewable Energy Catapult

ORE Catapult (<https://ore.catapult.org.uk>) is the UK's leading technology innovation and research centre for offshore renewable energy. Headquartered in Glasgow, it has world-leading test and demonstration facilities in Blyth, Northumberland and Fife, Scotland. The senior management team is split between Glasgow and Blyth, with extensive technical expertise and knowledge at both locations.

ORE Catapult's vision is to be the world's leading offshore renewable energy technology centre by 2030.

ORE Catapult will play a key role in delivering the UK's largest clean growth opportunity, through our mission to accelerate the creation and growth of UK companies in the offshore renewable energy sector. We will use our unique facilities and research and engineering capabilities to bring together industry and academia and drive innovation in renewable energy.

## 2 ITT PROCESS

### 2.1 Stages

This invitation to tender ("ITT") comprises of the following X (x) stages:

#### 2.1.1 Stage 1: General Due Diligence

Submissions will be evaluated based on the following "PASS/FAIL" Criteria:

Submission of the following documents	Evaluation
Tenderer Response Document – Appendix 2 – if not submitted, this will be deemed an automatic fail	PASS/FAIL
Commercial Submission – Appendix 4, Offer Worksheet – if not submitted, this will be deemed an automatic fail	PASS/FAIL
<b>General Due Diligence</b>	
The following questionnaires will be evaluated based on the given response to each question. Where information or documentation to be submitted by tenderers is or appears to be incomplete or erroneous, or where specific documents are missing, ORE Catapult reserve the right request the tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit, provided that such requests are made in full compliance with the principles of equal treatment and transparency.	
Selection Questionnaire via the on-line e-procurement portal	PASS/FAIL

A "FAIL" on any of the Stage 1 General Due Diligence criteria will result in the tender response being rejected in its entirety.

ORE Catapult may decide not to proceed to Stage 2 Award if deemed not to be in their best interests.

#### 2.1.2 Stage 2: Award

All Tenderers successfully passing all Stage 1 criteria, will be evaluated and scored against the predefined and advertised Stage 2 Evaluation Criteria at Section 10 (Evaluation Criteria).

NB: Please ensure you include your responses to the Stage 2, Technical & Commercial evaluation criteria, with your submission. This will not be asked for at a later date. Failure to provide this information will result in your submission being deemed non-compliant and being eliminated from further evaluation.

#### 2.1.3 Stage 3: Interviews / Site Visits

ORE Catapult reserve the right to carry out a selection [interview/site visit](#). It is anticipated that only the top X highest scoring companies will be invited to participate in [interview/site visit](#).

### 2.2 Timetable

This timetable is indicative only. ORE Catapult reserves the right to change it at its discretion.

Stage	Target Date/Time
Deadline for submission of questions in relation to this ITT	Friday 26 <sup>th</sup> September @ 1400hrs
Deadline for submission of completed ITT Documentation <sup>1</sup>	Friday 26 <sup>th</sup> September @ 1400hrs
Evaluation of submitted ITT's	w/c 29 <sup>th</sup> September 2025
Issue of accept / decline letters	w/c 20 <sup>th</sup> October 2025
Contract commencement	Monday 3 <sup>rd</sup> November 2025
Deadline for submission of questions in relation to this ITT	Friday 26 <sup>th</sup> September @ 1400hrs
Deadline for submission of completed ITT Documentation <sup>2</sup>	Friday 26 <sup>th</sup> September @ 1400hrs

## 2.3 Guidance Notes for Completion

- 2.3.1** “ORE Catapult” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to select suitable suppliers to carry out the provision of the Service.
- 2.3.2** “You”, “Your” or “Tenderer” means the body completing this ITT i.e. the legal entity seeking to carry out the provision of the Service. The “Tenderer” is intended to cover any economic operators defined by the Procurement Act 2023 and could be a registered company; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
- 2.3.3** This ITT has been designed to assess the suitability of Tenderers to deliver ORE Catapult's requirement(s).
- 2.3.4** Tenderers are to respond to the ITT on the basis that ORE Catapult has no prior knowledge of your organisation or individuals employed by your organisation. Supplementary documentation may be attached to the ITT only where directed to do so. Such material must be clearly marked with the name of the Tenderer and the question to which it relates.
- 2.3.5** It is the Tenderer's responsibility to provide all the answers and information requested in a clear, concise and logical manner and at the appropriate points within the document. Cross referencing and reliance on enclosures (other than where specifically requested) should be avoided. In particular please DO NOT:
- include any promotional literature or cross-reference to any web-based material – this will not be considered as part of the selection process;
  - provide any information other than that requested, as this will not be considered as part of the selection process;
  - personalise or alter the ITT in any way (e.g. changing the original format, reducing the content by removing questions or altering the running order), as this may lead to your submission being disqualified;
  - submit documents in a format other than Word, Excel or PDF;
  - include any marketing material with your submission.
- 2.3.6** ORE Catapult reserves the right to take into consideration additional information publicly available from external sources when undertaking the evaluation.
- 2.3.7** It is the Tenderer's responsibility to ensure ORE Catapult is not misled. The information provided in the ITT will be relied upon and taken to be true and accurate. If it is subsequently determined

<sup>1</sup> For the avoidance of doubt, if the submission deadline is different than the date published via the e-procurement portal, the date on the e-procurement portal shall apply.

<sup>2</sup> For the avoidance of doubt, if the submission deadline is different than the date published via the e-procurement portal, the date on the e-procurement portal shall apply.

that any information supplied was inaccurate and was relied upon for evaluation purposes, ORE Catapult reserves the right to exclude the offer to supply (if still under evaluation) or if the Contract has been awarded and the information inaccurately supplied had a significant bearing on the award then ORE Catapult shall be at liberty to terminate the Contract without incurring any financial or legal liability. In addition, ORE Catapult shall reserve the right to pursue all costs in establishing the reprovion of the Contract. It remains the responsibility of the Tenderer to keep ORE Catapult informed of any matter that may affect continued qualification.

**2.3.8** Please ensure that all responses are completed in full, and in the format requested. Failure to do so may result in your submission being disqualified.

**2.3.9** It is the responsibility of the Tenderer to ensure that your response is unambiguous and complete and to seek clarification, if necessary, of the requirements via the e-procurement portal.

**2.3.10** ORE Catapult may request additional information to be supplied in response to the evaluation questions in Section 10. If this is a requirement, Appendices should be clearly identified as such in your submission.

Note that where ORE Catapult has stated a word or page maximum response and tenderers ignore the information and exceed the word / page count maximum; ORE Catapult reserve the right only to consider information provided within the first part of the response meeting the maximum requirement e.g. maximum word count is 500 words and tenderers submit 600 words, ORE Catapult will only read first 500 words.

**2.3.11** ORE Catapult will not be responsible for any expenses incurred in the preparation of any submission, in attendance at any meetings, visits or clarifications.

#### **Verification of information provided**

**2.3.12** Whilst reserving the right to request information at any time throughout the procurement process, ORE Catapult may enable the Tenderer to self-certify that there are no mandatory/discretionary grounds for excluding their organisation. When requesting evidence that the Tenderer can meet the specified requirements ORE Catapult may obtain such evidence after the final tender evaluation decision i.e. from the successful Tenderer(s) only.

#### **Sub-Contracting arrangements**

**2.3.13** Where the Potential Supplier proposes to use one or more sub-contractors to deliver some or all of the Contract requirements, Section 4.7 (Additional Due Diligence Questionnaire) of the Appendix 2 Tenderer Response Document must be completed by each sub-contractor and included with in your submission.

**2.3.14** ORE Catapult recognises that arrangements in relation to sub-contracting may be subject to future change and/or may not be finalised until a later date. However, Tenderers should be aware that where information provided to ORE Catapult indicates that sub-contractors are to play a significant role in delivering the Contract, any changes to those sub-contracting arrangements may affect the ability of the Tenderer to proceed with the procurement process or may (at the absolute discretion of ORE Catapult) require reassessment of the Tenderer's bid by ORE Catapult. Tenderers should therefore notify ORE Catapult immediately of any proposed change to sub-contractor arrangements. ORE Catapult reserves the right to accept the proposed changes in exceptional circumstances only and/or to deselect the Tenderer prior to any award of Contract, based on such a change and the updated information. Where the Tenderer is acting as a lead partner on behalf of a consortium, changing the lead partner is at the absolute discretion of ORE Catapult and in any event, is likely to require a full reassessment of the bid, additional requirements may need to be fulfilled by the Tenderer.

#### **Consortia arrangements**



- 2.3.15** If the Tenderer completing this ITT is doing so as part of a proposed consortium, the following information must be provided;
- names of all consortium members;
  - the lead member of the consortium who will be contractually responsible for delivery of the Contract (if a separate legal entity is not being created); and
  - if the consortium is not proposing to form a legal entity, full details of proposed arrangements within a separate Appendix.
- 2.3.16** Please note that ORE Catapult may require the consortium to assume a specific legal form if awarded the Contract, to the extent that a specific legal form is deemed by ORE Catapult as being necessary for the satisfactory performance of the Contract.
- 2.3.17** All members of the consortium will be required to provide the information required in all sections of the ITT as part of a single composite response to ORE Catapult i.e. each member of the consortium is required to complete the form.
- 2.3.18** Where you are proposing to create a separate legal entity, such as a Special Purpose Vehicle (SPV), you should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity in a separate Appendix.
- 2.3.19** ORE Catapult recognises that arrangements in relation to sub-contracting may be subject to future change and/or may not be finalised until a later date. However, Tenderers should be aware that where information provided to ORE Catapult indicates that sub-contractors are to play a significant role in delivering the Contract, any changes to those sub-contracting arrangements may affect the ability of the Tenderer to proceed with the procurement process or may (at the absolute discretion of ORE Catapult) require reassessment of the Tenderer's bid by ORE Catapult. Tenderers should therefore notify ORE Catapult immediately of any proposed change to sub-contractor arrangements. ORE Catapult reserves the right to accept the proposed changes in exceptional circumstances only and/or to deselect the Tenderer prior to any award of Contract, based on such a change and the updated information. Where the Tenderer is acting as a lead partner on behalf of a consortium, changing the lead partner is at the absolute discretion of ORE Catapult and in any event, is likely to require a full reassessment of the bid, additional requirements may need to be fulfilled by the Tenderer.

### **Confidentiality**

- 2.3.20** When providing details of contracts in answering Section 4.1 of the General Due Diligence Questionnaire (Requirement Specific Questions), the Tenderer agrees to waive any Contractual or other confidentiality rights and obligations associated with these Contracts.
- 2.3.21** ORE Catapult reserves the right to contact the named customer contact in Section 4.1 of the General Due Diligence Questionnaire (Requirement Specific Questions) regarding the Contracts included. The named customer contact does not owe ORE Catapult any duty of care or have any legal liability, except for any deceitful or maliciously false statements of fact.
- 2.3.22** ORE Catapult 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 Procurement Act 2023, as appropriate.

### **Signing of ITT Document**

- 2.3.23** The Tender Declaration at Para 2 and the No Collusion Certificate at Para 3 of the Appendix 2, Tenderer Response Document, must be signed where indicated and must be signed only by persons authorised to do so on the Tenderers' behalf e.g. Director/Company Secretary. Failure to



comply with this instruction may lead to your submission being deemed non-compliant and rejected in its entirety.

- 2.3.24** Digital signatures are acceptable. Alternatively, please print the finished document, sign all sections where indicated in permanent wet ink, and scan to a common electronic document format e.g. Adobe PDF (recommended). Upload the scanned document to the portal. Retain the wet ink original should it need to be inspected by ORE Catapult for compliance.

### **3 E-PROCUREMENT PORTAL SUBMISSION**

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- 3.1** Any questions in relation to this ITT must be posted via the e-procurement portal ONLY. Any questions asked via e-mail to ORE Catapult will not receive a response. The name of the Tenderer posing a question is visible to ORE Catapult but remains anonymous to all other Tenderers (unless included in the text of the question). All updates / amendments / clarifications in relation to the ITT will only be issued via the e-procurement portal. This will provide an audit trail of all discussions / clarifications. Any questions asked that can clearly be answered by reading the published documentation shall not receive a response.
- 3.2** All requests to extend the deadline shall be made via the e-procurement portal ONLY. No application for extension will be considered if received less than seven (7) calendar days prior to the submission deadline date fixed in the ITT. For the avoidance of doubt, ORE Catapult do not have access to submissions until after the ITT submission deadline.
- 3.3** Tenderers are advised not to leave it until the last day to upload responses / documents in case of technical difficulties. ORE Catapult accepts no responsibility for failure of the e-procurement portal, therefore all technical problems with the system must be reported via e-mail to the portal support team before the submission deadline.
- 3.4** The option to submit the completed tender submission is given at the last stage of the three (3) stage submission process. Please note, that all questions at stage one (1) are required to be answered before the option to click on “submit response” button, is given. Once the tender submission has successfully been submitted, the response manager table will display an onscreen confirmation with the time and date stamp of submission, shown. Should tenderers require any assistance during this process, or do not receive the onscreen confirmation in the response manager table, you are strongly advised to seek assistance from Delta, directly. Delta can be contacted via e-mail on [helpdesk@delta-esourcing.com](mailto:helpdesk@delta-esourcing.com) or via telephone to their Delta support team on +44(0)800 923 9236. Lines are open 8am – 6pm (GMT).
- 3.5** Any Tenderer that has expressed interest via the e-procurement portal (and therefore has downloaded / received an ITT) but has subsequently decided not to make a formal submission

should withdraw their interest via the e-procurement portal, giving a reason for withdrawal wherever possible.

## 4 GENERAL CONDITIONS OF CONTRACT

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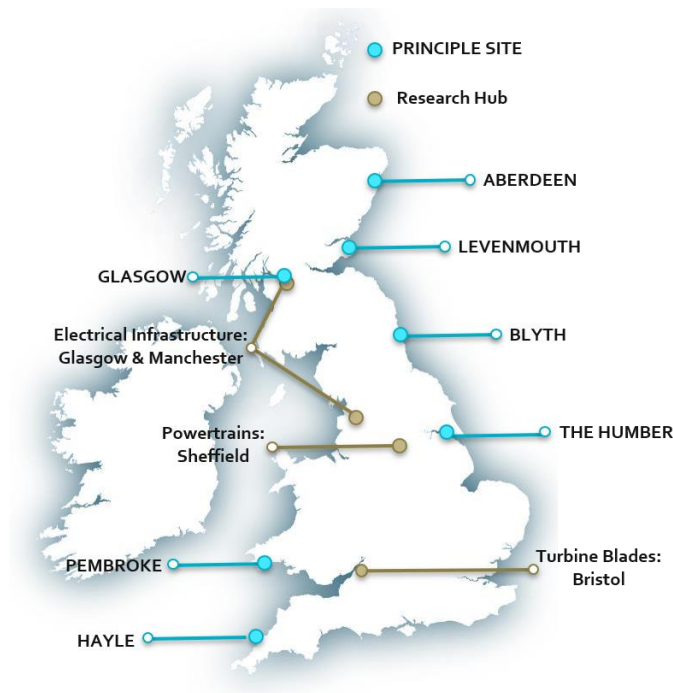
- 4.1 ORE Catapult General Conditions of Contract are shown separately at Appendix 1.
- 4.2 Any caveats to the General Conditions of Contract must be red line items only, as all caveats will be evaluated as per Section 10 below.
- 4.3 Requests to amend the General Conditions of Contract post Contract award shall not be accepted.

## 5 SCOPE OF WORK

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### 5.1 Framework Background

- 5.1.1 The purpose of this ITT is to assist ORE Catapult in establishing a 4FOR Consultancy Services Framework Agreement.
- 5.1.2 It is anticipated that three (3) suppliers shall be appointed to Lot 1 within this Framework and that five (5) suppliers shall be appointed to Lot 2 within this Framework to provide F4OR Consultancy Services to ORE Catapult and any Trading Subsidiaries. ORE Catapult reserves the right to appoint fewer or more than this number if deemed to be in its best interests.
- 5.1.3 Companies must be advised they are only allowed to apply for one (1) lot. Submissions for both lots will not be accepted. Different subsidiaries and companies under one umbrella must not submit for both. We reserve the right to disqualify any applicant if you fit into the above categories.
- 5.1.4 Following successful appointment, any Services required under this Framework Agreement shall be called-off in accordance with the nature of the individual expertise required.
- 5.1.5 ORE Catapult **does not** guarantee any volume or value of work from any Lot within this F4OR Consultancy Services Framework Agreement.
- 5.1.6 ORE Catapult has a requirement for a Consultant to fulfil the role of the Sector Specific Industrial Advisor (SSIA) for the F4OR North East Scotland programme and for additional Consultant(s) to fulfil similar roles in any future requirements of a similar nature.
- 5.1.7 The Framework Agreement shall therefore consist of the following two (2) Lots:
  - LOT 1 – Sector Specific
  - LOT 2 – Business Excellence
- 5.1.8 It is the intention of ORE Catapult to award the Lot 1 Contract to three (3) suitably qualified and experienced Consultant.
- 5.1.9 It is the intention of ORE Catapult to appoint five (5) suitably qualified and experienced Consultants to Lot 2 of this Framework Agreement. However, ORE Catapult reserves the right to appoint fewer or more Consultants to Lot 2 if deemed to be in their best interests to do so e.g. value for money, geographical location.
- 5.1.10 The map below shows the current locations of ORE Catapult principle UK sites and Research Hubs. However, there may be additional requirements for other existing or new locations to be serviced during the course of the Lot 2 Framework Agreement.



**5.1.11** ORE Catapult has a requirement for service provision within the following geographical locations:

- West and Central Scotland
- East Coast of Scotland
- North of Scotland
- North East England
- East of England and the South East
- South West of England
- Wales
- North West of England
- Northern Ireland

These locations represent the main areas of current ORE Catapult operations.

**5.1.12** Tenderers are therefore required to indicate, on the Tender Declaration included within the Appendix 2 Tenderer Response Document, which geographical location(s) they are able to service.

**5.1.13** Requests to add geographical locations to service capability, post Framework appointment, shall not be accepted/considered.

**5.1.14** ORE Catapult do not guarantee any volume or value of work within this Framework Agreement.

**5.1.15** All Services required under the Lot 2 Framework Agreement shall be called-off in accordance with the procedures detailed in Appendix 4, Operation of the Framework.

## **5.2 Requirement**

**5.2.1** Following the success of the Fit for Offshore Renewables programme in Scotland, Wales and England, ORE Catapult is delivering a further Fit for Offshore Renewables programme in partnership with Northeast Combined Authority (NECA) for businesses in the Northeast England. It is anticipated that additional Fit for Offshore Renewables programmes will also be undertaken

**5.2.2** The programme is a Supply Chain Development Programme developed to increase the competitiveness, capacity and competence of the UK Offshore Renewable Energy Supply Chain. It

shall support the continued cost reduction in Offshore Renewables, whilst simultaneously securing long-term economic benefits in the UK.

**5.2.3** The programme does this by:

- Identifying appropriate organisations to participate. Organisations are selected based on anticipated demand for specific products / services on a project, regional , national and/or international level;
- Assessing the core business management systems of the business to confirm these are aligned with business management best practice in an Engineering and Technology Business Management context;
- Assessing Offshore Renewable Energy specific knowledge, capability and competence, to determine the level of maturity in the organisation. Where this falls below the standard desired by the industry, the programme works to develop the relevant knowledge, capability and competence to the required standard;
- Granting the organisation the status of " Fit 4 Offshore Renewables" to highlight their knowledge, capability and competence to the Offshore Renewable Energy Industry;
- Maintain a database of F4OR granted organisation which in the industry can access; and
- Facilitating networking opportunities to raise awareness of the F4OR Organisations

**5.3 LOT 1 - Sector Specific**

**5.3.1** The Consultant shall fulfil the role of the Sector Specific Industrial Advisor (SSIA) for the F4OR North East England programme. The main function of this role is to support the participating companies throughout their F4OR journey - from their initial sign up to the programme, through their assessment, execution of their action plan, right through to the granting of their 'Fit for Offshore Renewables' status.

**5.3.2** The SSIA role requires a good understanding of good business practice in the six (6) Business Excellence competencies assessed in the programme:

- Strategy and Leadership;
- People;
- Health, Safety and Environment;
- Quality;
- Design and Project Delivery; and
- Process and Operations.

**5.3.3** Additionally, the SSIA role requires specific, essential relevant expert knowledge in the six (6) Sector Specific competencies to be assessed during the programme:

- Sector Knowledge;
- Sector Specific HSE;
- Cost Reduction and Competitiveness;
- Capacity and Capability;
- Technical Risk Management and
- Commercial Risk Management

- 5.3.4** The successful tenderer is required to deliver the following the workshop modules.
- 5.3.5** These fifteen (15) modules directly relate and feed into the six (6) Sector Specific competencies listed above.
- 5.3.6** This is the assumed structure of the syllabus upon which delivery should be based'
- **MODULE 1:** A General Overview of Offshore Wind
  - **MODULE 2:** The Supply Chain Landscape in Offshore Wind
  - **MODULE 3:** The Contracting Landscape in Offshore Wind
  - **MODULE 4:** Customer Analysis in Offshore Wind
  - **MODULE 5:** Competitor & Collaborator Analysis in Offshore Wind
  - **MODULE 6:** Finding & Pursuing Opportunities in Offshore Wind
  - **MODULE 7:** The Offshore Wind Technical Landscape
  - **MODULE 8:** The Offshore Wind Operational Landscape
  - **MODULE 9:** The Offshore Wind HSEQ Landscape
  - **MODULE 10:** The Offshore Wind Investment Landscape
  - **MODULE 11:** The Offshore Wind Marketing Landscape
  - **MODULE 12:** The Energy Transition
  - **MODULE 13:** The Offshore Wind Skills Landscape
  - **MODULE 14:** Component Manufacturing for Offshore Wind
  - **MODULE 15:** Innovation in Offshore Wind
- 5.3.7** The role requires the ability to effectively engage and influence companies at a senior level, ensuring that conflicts are handled constructively and professionally and that successes are celebrated enhancing the company's profile.
- 5.3.8** The role will also require you to engage with organisations such as Scottish Enterprise, Highlands and Islands Enterprise, offshore wind cluster(s), and working groups across the UK to ensure that cross promotion of offerings are understood and encouraged.
- 5.3.9** The nature of this role is largely field based with travel across all of the UK ,possibly including overnight stays.
- 5.3.10** The F4OR team will guide and support you through induction and on an ongoing basis. You will also be supported by the broader team at the ORE Catapult who will help you to understand the current capabilities and future aspirations within ORE Catapult and broader sector, which can further compliment the F4OR activities.
- 5.3.11** You will report to the F4OR Project Manager and work closely with the F4OR Programme Manager and the also Business Excellence Industrial Advisor.
- 5.3.12** The core responsibilities of the role include:
- To act as a key representative of the UK's offshore renewable energy supply chain, being a recognised source of expertise for the F4OR project, both internally and externally;
  - Facilitating and supporting companies throughout their entire F4OR journey, ensuring the online management system (F4OR Portal) is completed accurately at each stage, including:
  - Carrying out a comprehensive assessment using the F4OR diagnostic framework;
  - Compiling a post audit report with recommended actions for the company to consider;
  - Supporting companies to generate an Action and Improvement Plan;
  - Monitoring progress of the companies' Action and Improvement Plans towards completion;
  - Leading programme and progress local surgery activities with companies, providing feedback and guidance;
  - Delivering capability building workshops and sessions, either 1-2-1 with organisations, or as a cohort

- Maintaining awareness of current market knowledge, technology development and supply chain support offerings such as Offshore Wind Growth Partnership, raising awareness throughout F4OR participating companies as appropriate;
- Providing regular updates, including in person, to the wider F4OR Team, including ORE Catapult and Business Excellence advisors;
- Actively managing risks and conflicts of interest ensuring maintenance of the F4OR and ORE Catapult reputation and that of the associated organisations and services;
- Represent the ORE Catapult and F4OR at relevant events, including presenting where appropriate;
- Commitment to exhibiting professional behaviour when conducting duties in association with F4OR;
- Any other duties, commensurate with the role.

**5.3.13** Additionally, the Consultant shall carry out the following activities:

- Provide a mandatory monthly progress report of the training and consultancy being delivered.
- The Consultant shall comply with GDPR, in so far as they apply, throughout delivery of Contract.
- The Consultant shall copy the ORE Catapult Project Manager into all written correspondence with the SMEs to ensure a full audit trail is available.
- Identify innovative and resourceful ways of delivering the role, i.e. cohort / group training sessions, specialised reports that could be utilised for a group of participants and, if agreed to by the F4OR Project Team, then provide and prepare all course material and / or reports required.

**5.4** **LOT 2 – Business Excellence**

**5.5** **Requirement**

**5.5.1** The Consultant shall fulfil the role of the Business Excellence Industrial Advisor (BEIA) for the F4OR Northeast England programme. The main function of this role is to support the participating companies throughout their F4OR journey - from their initial sign up to the programme, through their assessment, execution of their action plan, right through to the granting of their 'Fit for Offshore Renewables' status.

**5.6** **BE IA responsibilities**

**5.6.1** The primary role of the BE IA is to assess the business excellence status of the participating organisation, and then support them to make the required developments / improvements in a timely and appropriate manner. The BE IA is responsible for:

- Facilitating and supporting companies throughout their entire F4OR journey, ensuring the online system (F4OR Portal) is completed accurately at each stage;
- Monitoring progress of the SS activities and SS IA ensuring the online system (F4OR Portal) is completed accurately at each stage;
- Carrying out a comprehensive BE verification using the F4OR diagnostic framework;
- Compiling a BE verification report with recommended actions for the company to consider; • Supporting companies to generate an action and improvement plan, highlighting sources of relevant support and information;
- Monitoring progress of the companies' action and improvement plans towards completion;
- Completing pre-granting business excellence verification activities and collating required evidence;
- Presenting a company for granted status to the granting panel;

- Maintaining awareness of current market knowledge, business management best practice and supply chain support, raising awareness throughout F4OR companies as appropriate.

#### 5.6.2 Further BE IA responsibilities

#	Process	BE IA Responsibility
1	Manual Review of CQ	Manage and coordinate manual review
2	Manual review of self-assessment (SDA)	Manage and coordinate manual review
3	Business Excellence Verification	Assess company for BE, gathering evidence and liaising with SS IA as appropriate
4	Generation of Verification Report	Write draft report and log evidence on portal
5	Issue Draft Verification Report	Issue draft report via portal and inform company via email
6	Review and Approve Baseline Action Plan	Ensure action plan addresses the gaps identified. Feedback and accept / reject action plan
7	Progress Review	Schedule and deliver reviews with company at (max) 3-month intervals
8	Action Plan Review and Update	Review action plan and feedback
9	Pre-granting Assessment	Assessing company, gathering evidence.
10	Granting Panel Meeting	Presenting evidence, reviewing evidence and providing business excellence insight.

### 5.7 Business Excellence Advisor Competencies

**5.7.1** The table below provides a summary of the minimum competence level required for the BE and SS Industrial Advisor roles.

**Note\*** only applies if Business Excellence IA is fully trained and SQEP in SS

**V** = can Verify (level 1)

**A** = can Advise (level 2)

**T** = can Train (level 3)

Job Role	Competence Level Required for Each Role
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	Business Excellence	Sector Specific
Business Excellence IA	V A T	A
Sector Specific IA	A	V A T

## 5.2 Reporting

**5.7.2** BE IA advisors need to report to the F4OR program manager/ F4OR project manager regarding the progress of allocated companies.

Objective	KPI Lead Indicator	Source	Responsibility	Frequency
Improve BE performance	Stalled companies IA client interactions / visits;	F4OR Portal Report	BE Industrial Advisor	Monthly
Granting F4OR capable organisations	Active action plans; Ready for pre granting;	F4OR Portal Report	BE Industrial Advisor and SS Industrial Advisor	Monthly

## 5.8 Outputs and Milestones

### 5.9 LOT 1 - Sector Specific

#### 5.9.1 Phase 1

- Carry out a comprehensive Sector Specific (SS) verification using the F4OR diagnostic framework (supplied by F4OR Team) for each participating organisation.
- Compile a SS verification report with recommended actions for each participating organisation to consider.
- Support participating organisations to generate an action and improvement plan, highlighting sources of relevant support and information and approve this action plan.

#### 5.9.2 Phase 2

- Provide ongoing support and monitoring of progress for each participating organisation to make the required developments and improvements outlined in their action and improvement plan in a timely and appropriate manner.
- Report on the progress of each participating organisation action and improvement plans towards completion.
- Undertake delivery of 4FOR “Northeast England SS Workshops”.
- Complete pre-granting SS verification activities and collate required evidence.
- Present each participating company for granted status to the granting panel.

## **5.10 Milestones**

### **5.10.1 Phase 1 - Target: to be agreed with F4OR programme manager**

- M1. Participating organisations supported through their SS assessment, verification, action plan creation and action plan approval.

### **5.10.2 Phase 2 – Target: to be agreed with F4OR programme manager**

- M2. Participating organisations provided with ongoing SS support such that each action plan is completed, pre-granting SS verification activities are complete, and all evidence collated.
- M3. Participating organisations presented for granted status to the granting panel.

**Consultant shall complete all works by agreed time with the F4OR program manager**

## **5.11 Monthly Outputs**

- Progress updates for each of the participating organisations to the F4OR Project Team in an agreed format;
- Attendance of regular project meetings with the F4OR project delivery team

## **5.12 Implementation**

**5.12.1** A kick-off meeting will be arranged with the Consultant post award, the Consultant shall provide an Implementation plan showing the delivery approach, methodologies and processes to manage and track the progress of the support delivered to the participating organisations. This plan must not take longer than two (2) weeks post award to complete and present to the Project Team.

## **5.13 LOT 2 – Business Excellence**

### **5.13.1 Phase 1**

- Carry out a comprehensive Business excellence Specific (BES) verification using the F4OR diagnostic framework (supplied by F4OR Team) for each participating organisation.
- Compile a BE verification report with recommended actions for each participating organisation to consider.
- Support participating organisations to generate an action and improvement plan, highlighting sources of relevant support and information and approve this action plan

### **5.13.2 Phase 2**

- Provide ongoing support and monitoring of progress for each participating organisation to make the required developments and improvements outlined in their action and improvement plan in a timely and appropriate manner.
- Report on the progress of each participating organisation action and improvement plans towards completion.
- Complete pre-granting BE verification activities and collate required evidence.
- Present each participating company for granted status to the granting panel.

## **5.14 Milestones**

### **5.14.1 Phase 1 – Target: to be agreed with F4OR programme manager**

- M1. Participating organisations supported through their BE assessment, verification, action plan creation and action plan approval.

#### 5.14.2 Phase 2 – Target: to be agreed with F4OR programme manager

- M2. Participating organisations provided with ongoing BE support such that each action plan is completed, pre-granting BE verification activities are complete, and all evidence collated.
- M3. Participating organisations presented for granted status to the granting panel.

**Consultant shall complete all works by agreed time with the F4OR program manager.**

#### 5.15 Monthly Outputs

- Progress updates for each of the participating organisations to the F4OR Project Team in an agreed format;
- Attendance of regular project meetings with the F4OR project delivery team.

#### 5.16 Implementation

**5.16.1** A kick-off meeting will be arranged with the Consultant post award, the Consultant shall provide an Implementation plan showing the delivery approach, methodologies and processes to manage and track the progress of the support delivered to the participating organisations. This plan must not take longer than two (2) weeks post award to complete and present to the Project Team.

#### 5.17 Payment Terms

**5.17.1** ORE Catapult shall pay the invoiced amounts within thirty (30) days from the date of the invoice. However, Tenderers are invited to detail any discounts that may be offered for payment made earlier e.g. within fourteen (14) days.

**5.17.2** Please note that ORE Catapult operate a strict no PO (Purchase Order) no pay (payment) policy.

**5.17.3** All invoices and statements shall be sent electronically to ORE Catapult's Finance email address [finance@ore.catapult.org.uk](mailto:finance@ore.catapult.org.uk) and **MUST** quote the relevant purchase order number.

## 6 CONTRACT TERM

The initial Term shall be for a period of thirty-six months (36) with an option to extend for a further period of twelve (12) months, with an indicative start date of Monday 3rd November 2025.

The successful tenderers must be able to provide service to as many individual cohort as possible. The length of each cohort can vary up to 24 month, with a possible extension of 3 month.

## 7 COMPULSORY INSURANCE COVER

In accordance with the ORE Catapult General Conditions of Contract referred to in Section 4, the Contractor shall have affected and shall maintain appropriate levels of insurance as follows:

<b>Employer's (Compulsory) Liability Insurance</b>	£5m
<b>Public Liability Insurance</b>	£1m
<b>Product Liability Insurance</b>	£1m
<b>Professional Indemnity Insurance (if applicable)</b>	£1m
*It is a legal requirement that <b>all</b> companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders.	

## 8 REPORTING ARRANGEMENTS

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The personnel provided to deliver the Service(s) shall report directly to, and only take instructions from Davood Sabaei, Supply Chain Project Manager (and Chief Executive Officer as required).

## 9 PROPOSAL

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### Return of the ITT

9.1 Tenderers must submit the following documents as separate downloads:

- Appendix 1 General Conditions of Contract – red line clauses only
- Appendix 2 Offer Worksheet; and
- Section 10.1 (1) Technical Proposal

Failure to comply with this instruction may lead to your submission being deemed non-compliant and rejected in its entirety.

9.2 No submission will be considered unless it is received by the specified date / time as hereinafter defined and using the e-procurement system specified in the ITT. The phrase "specified time" means the time fixed on the e-procurement portal which may be altered only by the ORE Catapult Procurement Team.

9.3 ITTs received by any method other than via the e-procurement portal shall be deemed non-compliant and therefore rejected. For the avoidance of doubt, all hard copy (paper) or e-mailed submissions will be automatically rejected.

### 9.4 Alternative Tenders

Alternative tenders may be offered involving modifications to the specified requirements. Any alternative tender involving modifications will be assessed on its merits and, if considered valid, may be accepted without recourse to re-tendering. In all instances where alternative tenders are submitted the Contractor must also submit a Primary Tender being exactly to the specification and requirements of the ITT, in order to see where costs differ. Should an alternative tender be submitted ORE Catapult General Conditions of Contract shall apply and not be affected in any way.

### 9.5 Complaints

If you have a complaint or grievance regarding this procurement process please contact:

**Offshore Renewable Energy Catapult**

Inovo

121 George Street

Glasgow

G1 1RD

For the attention of: Finance Director

Email: [procurement@ore.catapult.org.uk](mailto:procurement@ore.catapult.org.uk)

Tel: +44 (0)333 004 1400

### 9.6 Technical Proposal

Tenderers shall submit a Technical proposal based on the criteria detailed in Section 10.1 (i) below.

### 9.7 Commercial Proposal

Prices shall be provided on a **fixed cost basis** and shall be in pounds sterling and exclusive of VAT.

Tenderers should also specify any other costs associated with the delivery of the Service. Claims for any additional costs, not stated, will not be considered at a later date.

At a minimum, ORE Catapult encourages all of its suppliers to pay employees the ['Real Living Wage'](#).

Any obvious arithmetical errors will be rectified by the appropriate officer checking the tenders and the amount of tender shall be held to be the amount of the documents so rectified and the tenderer informed in writing of the corrected amount.

Where there is an obvious and genuine error in rates occurring, the tenderer will be given the opportunity of either confirming that they agree to their tender being considered with the error remaining or withdrawing their tender. Should the tenderer decide to withdraw their tender, it will not be considered for acceptance.

## **9.8 Expenses**

For the avoidance of doubt all travel shall be carried out in full compliance with ORE Catapult Business Expenses Policy & Procedure, available on request. For the avoidance of doubt, suppliers shall be responsible for arranging and booking their own travel and accommodation.

## **9.9 ORE Catapult Rights**

ORE Catapult reserves the right to accept any part of the ITT. ORE Catapult is not bound to accept the lowest priced ITT, or any ITT, or part thereof.

ORE Catapult reserves the right to cancel or withdraw this ITT at any stage.

ORE Catapult shall not be held liable for any costs associated with your participation in this procurement process including costs associated with the preparation or submission of your tender submissions.

# **10 EVALUATION CRITERIA**

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## **10.1 Award of Contract**

Award of Contract for BOTH lots will be based upon the most advantageous tender (“MAT”) received. The evaluation will be based upon the undernoted award criteria:

### **i. Technical Approach (40%)**

- Project plan showing time scale and deliverables – 25%
- Methodology and Proposed Approach – 25%
- Understanding of this specific project requirements – 25%
- Skills and Experience of the Delivery Team – 25%

### **ii. Commercial Approach (60%)**

#### **Lot 1 -**

- Cost of service
- Project management cost
- Travel cost

#### **Lot 2 -**

- Cost of service
- Project management cost
- Travel cost

The lowest priced ITT will be awarded full marks i.e. 60%. The more expensive proposals will be ranked and scored in direct proportion to how much more expensive they are than the lowest priced ITT.

### iii. General Conditions of Contract – PASS/FAIL

General Condition of Contract	
Does your organisation agree to the general Conditions of Contract as published at Appendix 1 of the ITT and has signed the Tender Declaration in Appendix 2 (Tenderer Response Document) of the ITT Documentation?	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you have answered “No” to the above question, please submit, as a separate appendix, your proposed amendments to the General Conditions of Contract as published at Appendix 1 of the ITT.

This question **will** be evaluated on a PASS/FAIL basis and any proposed amendments will be reviewed against the following marking scheme to determine transfer of risk:

Marking Scheme	PASS/FAIL
Unacceptable transfer of risk to ORE Catapult and/or demonstrable and material dilution of the obligations of the Contract.	Non-Compliant (FAIL)
Minimal transfer of risk to ORE Catapult and/or demonstrable and material dilution of the obligations of the Contract.	Compliant (PASS)

## 10.2 Technical Approach

The technical proposal will be evaluated against the following evaluation criteria. A scoring of less than three (3) on any of the technical criteria will result in the response being rejected in its entirety.

Marking Scheme	Evidence	Score	Remarks
<b>No Response</b>	No response or part response to technical and/or Commercial evaluation criteria.	<b>0 FAIL</b>	Not acceptable
<b>Fails to meet the requirement</b>	Misleading response or a very poor response has been provided with major deficiencies or little relevant detail proposed. Indicates a weakness of the tenderer in understanding the requirement or simply failing to make an effort.	<b>1 FAIL</b>	Not Acceptable
<b>Partially meets the requirements</b>	Poor response only partially satisfies requirement/standard, with SIGNIFICANT deficiencies apparent and /or is inconsistent with other proposals. Response may be fairly generic, with evidence of having been used for other tenders. The scope of work may simply have been repeated back without addressing the specific requirement. Elements in the answer may be considered impractical, unbelievable, unconvincing or unworkable, or largely irrelevant to the project.	<b>2 Fail</b>	Major concerns

<b><i>Almost meets the requirement</i></b>	Response meets the minimum requirement but remains basic with reservations about the quality and/or the extent of the evidence provided which could have been expanded upon. Response is sufficient but does not inspire.	<b>3 PASS</b>	Minor concerns
<b><i>Meets the requirement</i></b>	Response is relevant and good and is sufficiently detailed to demonstrate a good understanding of the requirement. Includes a level of detail which adds meaning to the proposal but stops short of being truly exceptional.	<b>4 PASS</b>	Confidence
<b><i>Fully meets the requirement</i></b>	Evidence is consistent, comprehensive and directly relevant to the project in all aspects and is beneficial to ORE Catapult and significantly better than other responses. Response is supported by relevant and clear commitments. Proposals are highly credible, realistic, workable, practical and believable. The response is innovative and includes a full description of techniques and measurements that will be employed in the final solution.	<b>5 PASS</b>	Absolute confidence

### 10.3 Combined Approach

The technical and commercial scores will be combined (Technical 40X% / Commercial 60%) to determine the quotation which provides the most appropriate combination of quality and value for money.

### 10.4 Abnormally Low Responses

Where the overall tendered amount appears to be abnormally low, the supplier will be required to provide further written details of the constituent elements of the overall tendered amount or the tendered rates or any other information considered to be relevant.

Any failure to provide such information, where requested, may exclude the mini competition from further consideration. If, having considered the information provided, ORE Catapult is of the view that either the tendered total of the prices is abnormally low or any tendered amounts are abnormally low, the mini competition may be rejected in accordance with [The Procurement Act 2023 Regulation 19 \(3\)\(c\)](#)

## APPENDIX 1 GENERAL CONDITIONS OF CONTRACT

## APPENDIX 2 TENDERER RESPONSE DOCUMENT

## APPENDIX 3 OFFER WORKSHEET

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## GLASGOW

Inovo  
121 George Street  
Glasgow  
G1 1RD  
+44 (0) 333 004 1400

## BLYTH

National Renewable  
Energy Centre  
Offshore House  
Albert Street  
Blyth  
Northumberland  
NE24 1LZ  
+44 (0) 1670 359555

## LEVENMOUTH

Levenmouth Development  
Turbine  
Energy Park Fife  
Leven  
KY8 3RA

## GRIMSBY

O&M Centre of  
Excellence  
Cleethorpe Road  
Grimsby  
DN31 3LL

## ABERDEEN

Subsea UK  
Energy Transition Zone  
Building W-01  
Altens Industrial Estate  
Aberdeen  
AB12 3LE

## CORNWALL

Hayle Marine  
Renewables  
Business Park  
North Quay  
Hayle  
Cornwall  
TR27 4DD

## PEMBROKESHIRE

Marine Energy Engineering  
Centre of Excellence (MEECE)  
Bridge Innovation Centre  
Pembrokeshire  
South West Wales  
SA72 6UN

## CHINA

11th Floor, Lan Se Zhi  
Gu No. 15  
Ke Ji Avenue  
Hi-Tech Zone  
Yantai City  
Shandong Province  
China

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Twitter: [@ORECatapult](https://twitter.com/ORECatapult)

YouTube: [@orecatapult](https://www.youtube.com/channel/UCv3U3U3U3U3U3U3U3U3U3U3)