

6th June 2024

Dear Sir/Madam,

Invitation to Tender for the Benthic habitat changes post-construction of offshore wind: a strategic investigation project for the Carbon Trust's Offshore Renewables Joint Industry Programme for Offshore Wind (ORJIP Offshore Wind)

You are invited to submit a Tender for the Benthic habitat changes post-construction of offshore wind: a strategic investigation project (the "BenCh project" or "Project") which is part of the ORJIP Offshore Wind. The key objective of the Project is to conduct multi-site analysis of benthic monitoring data to investigate benthic habitat changes post-construction of offshore wind projects.

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

- Description of Tender (this document);
- ORJIP Offshore Wind Stage II Contractors' Conditions;
- Tender Certificate (Word template);
- Bid Price Calculation Sheet (Excel template); and
- Clarification Document (if applicable¹).

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail addresses: ivan.savitsky@carbontrust.com and zilvinas.valantiejus@carbontrust.com

Tenders must be submitted before Friday 12th July 12:00 BST. Any tenders received after this date and time will be deemed non-compliant.

Your Tender must consist of the following, the contents of which are described further below:

- Main Bid Document (pdf) – template not provided;
- Signed Tender Certificate (pdf) – template provided; and
- Bid Price Calculation Sheet (xls) – template provided.

The timeline of this procurement process is as follows:

Deadline for clarification questions	Tuesday 18th June 12:00 BST
Clarification Document published ¹	Friday 21st June
Submission of full Tender	Friday 12th July 12:00 BST
Bidder interviews	July 2024
Successful Contractor announcement	August 2024
Envisaged Contract award date	August 2024

Please e-mail any clarification questions, including questions about the timing of this ITT, to ivan.savitsky@carbontrust.com any time before Tuesday 18th June 12:00 BST. The complete set of clarification questions and all answers to clarification questions will be published in the

¹ A Clarification Document will not be published if no clarification questions are received in relation to this ITT.



Clarification Document on our website by Friday 21st June and will hence be visible to all potential Bidders: <https://www.carbontrust.com/news-and-events/tenders>

For information about ORJIP Offshore Wind, please see the Carbon Trust's web site: <https://www.carbontrust.com/our-projects/offshore-renewables-joint-industry-programme-orjip-for-offshore-wind>

We look forward to receiving your Tender.

Yours sincerely,

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

Offshore Renewables Joint Industry Programme for Offshore Wind



Invitation to Tender for the “Benthic habitat changes post- construction of offshore wind: a strategic investigation” Project

Description of Tender

June 2024



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IMPORTANT INFORMATION FOR BIDDERS

Publishing

Neither this document, nor any part of it nor any other information supplied in connection with it may, except with the prior written consent of the Carbon Trust, be republished, reproduced, copied, distributed or disclosed to any person for any purpose other than consideration by the recipient of whether or not to submit a tender.

Tender evaluation

The received tenders will be evaluated by the Carbon Trust and the ORJIP Offshore Wind Partners and the project-specific Project Expert Panel (PEP) against the criteria provided in section 7. The Bidder authorises the Carbon Trust to share its submitted Tender for this purpose with the ORJIP Offshore Wind Partners and, without any supporting financial information (Financial Proposal incl. the Bid Price Calculation Sheet), the parties appointed to the PEP. A shortlist of Bidders will be created and invited for interview. Carbon Trust will conduct vetting of the shortlisted bidders. Carbon Trust may request shortlisted bidders to fill-in a Due Diligence Questionnaire to supply additional information prior to being invited for an interview.

Contracting

Bidders should note that the Scope of Work contained in section 4 of this document does not constitute an offer to contract with the Carbon Trust. It only represents a definition of specific requirements and an invitation to submit a Tender addressing these requirements.

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

Should Your Tender be successful, a Final Scope of Work that builds upon the Scope of Work contained in section 4 of this document and Your Approach to Work will be mutually agreed between You and the Carbon Trust. Once the Final Scope of Work is agreed, Your offer will be formally accepted by the Carbon Trust issuing an Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing. The Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing will establish the Contract for the Benthic habitat changes post-construction of offshore wind: a strategic investigation project (the "**Contract**") between You and the Carbon Trust. With the exception of any minor amendments to the ORJIP Offshore Wind Stage II Contractors' Conditions which may be requested by the Bidder, the submission of a Tender shall constitute unqualified acceptance of the ORJIP Offshore Wind Stage II Contractors' Conditions. In the event that minor amendments to the ORJIP Offshore Wind Stage II Contractors' Conditions are requested, such amendments must be clearly stated and the exact alternative wording must be provided in Annex A of the Tender Certificate. Please note that it is at the sole discretion of the Carbon Trust to accept any of the proposed amendments and that the Carbon Trust reserves the right to require the provision of further information in relation to any such request. No minor changes other than those contained in Annex A of the Tender Certificate at the time of submitting the tender will be considered. No material changes will be considered at any time.

Mechanics of the Tender process

Bidders should note that:

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

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

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

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

Conflicts of interest

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

Disclaimer

The information contained in this Description of Tender document and in any documents or information it refers to or incorporates (the "**Disclosed Information**") has been prepared to assist interested parties in deciding whether to submit a Tender. The Disclosed Information is not a recommendation by the Carbon Trust. It does not purport to be all inclusive or include all the information that a Bidder may require.

Neither the Carbon Trust nor any of its directors, employees, agents or advisers makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the Disclosed Information. All such persons or entities expressly disclaim any and all liability (other than in respect of fraudulent misrepresentation) based on or relating to the Disclosed Information or any subsequent communication. The Bidder should conduct its own due diligence and seek its own professional, legal, financial and other advice as appropriate. The only information which will have any legal effect and/or upon which any person may rely will be such information (if any) as has been specifically and expressly represented and/or warranted in writing to the successful Bidder in any written contract that may be entered into with the Carbon Trust.

1. Introduction to the Offshore Renewables Joint Industry Programme for Offshore Wind

- 1.1. The Offshore Renewables Joint Industry Programme for Offshore Wind (“ORJIP Offshore Wind”) is a collaborative R&D programme between the Carbon Trust, EDF Energy Renewables Limited, Ocean Winds UK Limited, Equinor ASA, Orsted Power (UK) Limited, RWE Offshore Wind GmbH, Shell Global Solutions International B.V, SSE Renewables Developments UK Limited, TotalEnergies OneTech, Crown Estate Scotland, The Scottish Ministers and The Crown Estate Commissioners (the latter 11 collectively referred to in this document as “**ORJIP Offshore Wind Partners**”).
- 1.2. The objective of ORJIP Offshore Wind is to improve the evidence base in respect of the overall impact that offshore wind projects have on the marine environment and with regard to other uses of marine areas as well as better inform consenting authorities, offshore wind farm developers and other relevant stakeholders on the environmental risk that is associated with planned and existing offshore wind projects.
- 1.3. To achieve this objective, ORJIP Offshore Wind provides a framework to identify, develop, initiate and conduct impactful, relevant and strategic research and development projects aimed at reducing consenting risk, project maturation time, cost, and the environmental impact of offshore wind projects. Research is undertaken under areas that are chosen as priority focus areas for ORJIP Offshore Wind each year of the programme.
- 1.4. Contractors receive technical direction and data from ORJIP Offshore Wind Partners through the Carbon Trust management team and in collaboration with the parties in the Project Expert Panel.
- 1.5. This project will fall under the impacts on benthic ecology priority focus area.
- 1.6. Please note, the term “Contractor”, where used within this document, refers only to the successful Bidder or, in the event that the Contract is awarded to a consortium, the successful Bidders.

2. Background and objective of the BenCh project

1. Background to the project

Offshore Renewables Joint Industry Project (ORJIP) for Offshore Wind (OSW) launched its second stage in July 2019 to identify, prioritise and selecting research to reduce the consenting risk for offshore wind. As part of the project identification process, a ‘call for project ideas’ was issued to the ORJIP OSW Advisory Network in February 2023 with submissions being discussed at the ORJIP Prioritisation Workshop in April 2023.

Using the results from the Forum and further prioritisation by the ORJIP OSW Steering Group the project ‘*Benthic habitat changes post-construction: a strategic investigation [BenCh]*’ was identified as an industry priority and selected for procurement under ORJIP Stage 2 Phase 3.

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The construction and operation of offshore wind farm developments can impact benthic ecology and habitats of conservation importance. Despite monitoring data existing, there is limited understanding of the actual effects of offshore wind farms on the benthic

environment, and how these compare to pre-construction estimates. Where avoidance and mitigation have not been possible and it is not possible to rule out unavoidable adverse effects, the delivery of compensatory measures may be required to maintain the integrity of benthic habitats.

2. Aims and objectives

This project will conduct large-scale, multi-site analysis of benthic monitoring data at offshore wind farms¹ to investigate benthic habitat changes post-construction of offshore wind projects and evaluate the following research questions:

- **RQ1:** Are there suitable metrics to detect changes in benthic habitats that could be applied to offshore wind assessments?
- **RQ2:** Is there a measurable change (increase/decrease) in biodiversity and/or species composition?
- **RQ3:** Are there localised and regional ecological effects² around the infrastructure?
- **RQ4:** Is there change in ecological function (e.g., functional groups) as a result of biological changes?
- **RQ5:** Can recovery³ and/or enhancement be demonstrated and in what timeframe?

The research questions should be considered across the full lifecycle of a windfarm and associated infrastructure (from site investigation to decommissioning) and consider all viable approaches to site design and decommissioning (e.g., partial removal, full removal, repowering).

The Contractor is not expected to evaluate all research questions, and an interim workshop (WP3) will be conducted to prioritise the research questions to be addressed. The workshop will be a collaborative exercise between the Contractor, the ORJIP SG, and the Project Expert Panel. Contractors are encouraged to provide additional research questions of perceived importance in their tender submission.

Evaluation of the research questions is expected to inform the following policy positions in relation to benthic ecology and habitats across the full lifecycle of a windfarm (from site investigation to decommissioning):

¹ The boundary of an offshore wind farm includes all subsea infrastructure, including cabling (export and array), foundations (fixed-bottom offshore wind), and platforms, mooring lines, and anchors (floating offshore wind).

² The primary focus of this study is with regard to ecological effects rather than physical processes. This could extend to physical changes in the context of sediment type and associated implications for biota, rather than processes such as hydrodynamics.

³ We recognise that a robust baseline comparison can only happen with quantitative data that is available, e.g., pre-construction baseline survey, which may be used in analysis, in conjunction with other established definitions of recovery.

- **PP1:** Inform marine spatial planning
- **PP2:** Mitigating negative impacts through licensing and design standards
- **PP3:** Inform potential compensation scope and scale or identifying other options related to the research questions
- **PP4:** Support delivery and measurement of marine net gain

Whilst definitions of enhancement, recovery, and negative impacts may not be universally agreed upon, proposals should suggest definitions with most relevance to offshore wind consenting, potentially referring to advice from NatureScot and Natural England or similar, for use within the project.

3. Tender documents for submission

3.1. In response to this Invitation to Tender, Bidders are required to submit

- i. A Main Bid Document (pdf) – no template provided but contractors are requested to split the document between the Technical Proposal and the Financial Proposal;
- ii. The signed Tender Certificate (pdf) – template provided; and
- iii. The filled-in Bid Price Calculation Sheet (xls) – template provided.

3.2. The Main Bid Document should be no more than 20 pages excluding appendices and no more than 40 pages including appendices. Font should be clearly legible, and be at least font size 11. The Main Bid Document shall as a minimum include the following information:

Technical Proposal:

- i. The Bidder's proposed detailed Approach to Work (see section 4 and criterion 1 for more details). Bidders shall provide Work Package descriptions in the format set out at the end of section 4 in this document. The Approach to Work shall be split into a Technical Proposal and a Financial Proposal:
 - include a Gantt chart which describes the timeline for the Project, showing when each Work Package will start and finish;
 - outline how the Bidder will deliver the Scope of Work and do so on budget and within the allocated time;
 - specify any input data, background IP, hardware or other inputs that the Bidder requires the Carbon Trust and/or the ORJIP Offshore Wind Partners to provide;
 - specify any Alternative Work (i.e. substitute activities to take place instead of certain activities outlined in the Scope of Work in section 4), but without any supporting financial information. If Alternative Work forms part of the Approach to Work, the Bidder is expected to highlight, explain and justify the intended deviation from the Scope of Work. Alternative Work will be considered as non-optional when the Tender is evaluated; and
 - specify any Additional Work (i.e. activities to take place in addition to the activities outlined in the Scope of Work in section 4), but without any supporting financial information. If Additional Work forms part of the Approach to Work, the Bidder is expected to explain and justify why the

Additional Work would be beneficial and to provide a separate quotation for these activities. It is at the discretion of the Carbon Trust to consider Additional Work in the evaluation of the Tender.

- ii. an explanation of experience and staff skills, and how these are relevant to the Approach to Work – see criteria 2 and 3 for more details; and
- iii. supplementary information to provide experience evidence and skills evidence (e.g. CVs) – see criteria 2 and 3 for more details. This information should be provided as appendices to the Main Bid Document.

Financial Proposal:

- i. a pdf copy of the filled-in Bid Price Calculation Sheet;
 - ii. the offered Bid Price, including any cost assumptions deemed relevant by the Bidder – see section 6 and criterion 4 for more details;
 - iii. the price for any Additional Work proposed by the Bidder; and
 - iv. a Work Package specific breakdown of the costs per sub-contractor (if any).
- 3.3. The Tender Certificate must be signed by an authorised signatory. Bidders must fill in the provided template.
- 3.4. The filled-in Bid Price Calculation Sheet must be provided in Excel format in addition to the information provided in the Main Bid Document. See section 6 and criterion 4 for more details.
- 3.5. The failure by a bidder to submit either the Main Bid Document, the signed Tender Certificate or the filled-in Bid Price Calculation Sheet shall mean that such Tender is a non-compliant Tender.

4. Scope of Work

- 4.1. The Scope of Work is provided at the end of this section 4.
- 4.2. The Scope of Work comprises multiple Work Packages. The Scope of Work sets out the initial ideas on the key activities that the Contractor is expected to deliver for the Project.
- 4.3. It is expected that the Contractor will report on Project Deliverables to the ORJIP Offshore Wind Steering Group and the PEP. The Carbon Trust, ORJIP Offshore Wind Steering Group and the PEP shall review and provide feedback on each Project Deliverable. There will be at least one round of review comments to be accommodated by the Contractor for each Project Deliverable.
- 4.4. The Final Scope of Work will be agreed between the Carbon Trust and the Contractor when entering into the Contract. The Final Scope of Work may reflect any updates, changes or improvements to the Scope of Work as proposed by the Contractor in its Alternative Work or Additional Work and as agreed by the Carbon Trust.
- 4.5. Due to the breadth of skills and experience required for the Project, bidders may decide to build a consortium to successfully meet the objectives of the Project. If a Tender is submitted by a consortium it is expected that, in the case that the consortium is selected as the preferred Bidder, Carbon Trust will only enter into a Contract with the Project Coordinator, and that the Project Coordinator will subcontract the other members of the consortium.
- 4.6. The Carbon Trust appreciates that it will take a small team of mixed seniority approximately 10 months to complete the Project.
- 4.7. Bidders should use the Scope of Work as set out below to create the Approach to Work. Any Alternative Work or Additional Work shall be stated in the Approach to Work at the end of the relevant Work Package description.
- 4.8. It is expected that simplifying assumptions will be required to complete the work in the given timeframe. These assumptions should, to the extent possible at the time of Tender submission, be clearly stated in the Approach to Work. It is expected that during the

execution of the BenCh Project, any assumptions will be discussed with the ORJIP Offshore Wind Steering Group and the PEP prior to the start of each Work Package.

- 4.9. The Scope of Work includes three Optional Work Packages after a stage-gate. These are Work Packages that the TWG will reserve the right to execute or dismiss in the course of the Project.

WORK PACKAGES

Work package	Description of work
WP0 – Kick-off meeting	Goal Propose and agree definitions of enhancement, recovery, negative impacts, species richness, target species, etc.
	Activity The Contractor will lead a project kick-off meeting with the ORJIP Steering Group and Project Expert Panel to agree key definitions to be used within the study. At proposal stage, the terms to be defined and initial suggestions should be made.
WP0 Deliverables: D0: Kick-off meeting & slides	
WP1a – Literature review and stakeholder engagement	Goal Review and evaluate available literature related to the project research questions. The project should utilise available data from the UK and international offshore wind markets.
	Activity For each project research question (below) the Contractor should review relevant literature to: i. Outline the data and evidence requirements needed for a robust assessment to be made. In doing so, the Contractor should consider practical requirements (e.g., sampling techniques) and the associated implications. ii. Extract evidence from previous studies related to the research questions. This should include the collation and evaluation of offshore environmental impact assessments and post-consent monitoring reports. The evaluation is expected to include a comparative analysis of predicted and actual impacts. Where substantial data gaps exist and it is deemed suitable, the contractor should identify available 'proxy' evidence (e.g., from other marine infrastructure projects) with commentary on the assumed transferability to UK offshore wind infrastructure. iii. Critically review the studies to provide an assessment of, for example, methodological robustness, remaining uncertainties, transferability to other developments etc. It is expected that this

analysis should include comparison between environmental impact assessments and post-consent monitoring to determine data gaps and methodology improvements.

It is recognised that other groups may be progressing relevant workstreams whilst this review and project is ongoing. It is crucial that the Contractor is aware of latest developments and ongoing efforts in the field. Where appropriate, the review should go beyond published literature and incorporate engagement with expert stakeholders and grey literature to deliver an up-to-date and future-proofed review.

Contractors should demonstrate their awareness of related workstreams and activities in their tender submission, and their approach for incorporating evidence/knowledge from the studies in this project.

RQ1: Are there suitable metrics to detect changes in benthic habitats that could be applied to offshore wind assessments?

RQ2: Is there a measurable change (increase/decrease) in biodiversity and/or species composition?

RQ3: Are there localised and regional ecological effects around the infrastructure?

RQ4: Is there change in ecological function (e.g., functional groups) as a result of biological changes?

RQ5: Can recovery and/or enhancement be demonstrated and in what timeframe?

WP1a Deliverables:

D01: Literature review summary report

D02: For each research question, list of data sources to be collated in WP1b

WP1b – Data review and collation

Goal

Identify, and collate where possible, data and evidence requirements for the outlined research questions.

Activity

- i. **Where available, collate the data and evidence requirements previously identified in WP1a.** Proposals should provide a list of data they intend to collate in this Work Package, with acknowledgement of where permissions from data owners will be required. The ORJIP OSW SG may be able to facilitate data availability from developers.

	ii. Perform a data confidence assessment based on consideration of e.g., the age and sources of the data, sampling methods used. Strong proposals will demonstrate an understanding of the information that will be available from WP1a and WP1b, and therefore an assessment of the feasibility in answering all RQs.
WP1b Deliverables: D03: Signed Confidentiality Agreements with data providers (if required) D04: Data confidence assessment summary report D05: Presentation to the ORJIP Steering Group and Project Expert Panel	
WP2 – Data mapping and gap analysis	Goal Understand what research questions can be meaningfully answered with the collated data. Identify, and prioritise, data/evidence needs required to answer outstanding research questions. Activity For each research question, synthesise a) data and evidence requirements (WP1a), and b) data and evidence availability (WP1b), in an accessible format that clearly identifies remaining evidence gaps. An assessment of the evidence gaps should be performed to determine their impact (e.g., on uncertainty, fundamental viability) in reference to answering the research questions. The evidence map should permit two main activities in relation to the outlined research questions: • Identify the research questions that can be meaningfully answered during the course of this project; and • Identify priority research needs for future projects.
WP2 Deliverables: D06: Data mapping summary report D07: Presentation to the ORJIP Steering Group and Project Expert Panel	
WP3 – Interim workshop	Goal Agree a prioritised set of research questions that can be evaluated Activity - Identify and liaise with project stakeholders to arrange a workshop session. Project stakeholders are anticipated to include the ORJIP SG, the Project Expert panel, and additional sectoral experts as

	agreed. The Carbon Trust can facilitate communications where appropriate. - The Contractor will present a summary of evidence available from WP1a, WP1b, and WP2. The Contractor will then outline a suggested approach to evaluating the research questions. - The workshop should be structured to enable the Contractor to receive structured feedback on the proposal(s) to incorporate into the final proposal for remaining work. - This workshop may be in-person or virtual, and proposals should suggest an appropriate approach.
WP3 Deliverables: D08: Interim workshop and wrap-up report (inc. key discussions and decision points) D09: Workplan to evaluating the research questions	
STAGE GATE A go/no-go decision will be made based on the interim workshop and availability of data. The project will only be ceased if the ORJIP SG, in consultation with the PEP and Contractor, agree the subsequent work packages cannot be effectively delivered from the conclusion of the review and/or availability of datasets. The ORJIP SG will make this final decision.	
WP4 – Data analysis	Goal
	Evaluate the research questions using the collated data and in accordance with the workplan submitted under WP3.
	Activity
	Utilise data collected in WP1-WP3 to deliver the workplan submitted and approved under WP3.
	In the proposal stage, responses should demonstrate an understanding of the type of work that could be expected and the bidder’s experience of carrying out such work.
	As there is some uncertainty at this stage in terms of research questions that will be feasible to answer, proposals may provide several cost scenarios based on data availability and the number of research questions that will be feasible to answer.
	Tender responses should demonstrate the project team’s experience in conducting data analysis, with specific focus on benthic habitats highly favourable. Experience is desirable across: • GIS spatial analysis; • Benthic quality index;

	• PRIMER⁴ analysis; • Statistical power analysis; • UK Marine Habitat Classification.
WP4 Deliverables	
D10: Data analysis report	
D11: Presentation of project results to ORJIP Steering Committee and Project Expert Panel	
WP5 – Final report and publication	Goal Provide recommendations to the policy positions using the evidence base gained through WP1 – WP4. Deliver a comprehensive report detailing the outcomes of the project. The format should be compatible, or readily convertible, with submission to a journal or equivalent publication. Activity Prepare and deliver a comprehensive recommendations report detailing the outcomes of the project. Key results should be presented alongside project learnings, and the subsequent recommendations should inform the policy positions in relation to benthic ecology and habitats across the full lifecycle of a windfarm (from site investigation to decommissioning). Where appropriate, the Contractor should provide recommendations including roles and responsibilities for key stakeholder groups including: • Offshore wind farm developers • Environmental impact assessment practitioners • SNCBs • Regulators Contractor should use their knowledge of remaining evidence gaps to recommend priority follow-on work. The Contractor should undertake full grammatical and formatting proof-reading of the final report so that this is ready for publication. - PP1: Inform marine spatial planning - PP2: Mitigating negative impacts through licensing and design standards

⁴ Plymouth Routines in Multivariate Ecological Research

- PP3: Inform potential compensation scope and scale or identifying other options related to the research questions PP4: Support delivery and measurement of marine net gain	
WP5 Deliverables D12: Final project report outlining findings from previous WPs and final project recommendations	
WP6 – Project validation	Goal To provide a third-party review of the project deliverables to assess its accuracy and identify any shortfalls to progress the final report as a scientific publication
	Activity Conduct Peer Review including: - An independent review of project and outputs. - Publication of scientific report. Proposals should set out the intended approach to peer review, including details such as the proposed publication.
WP6 Deliverables D13: A short report outlining the validity of the project and outputs	
WPA Project Management	The contractor should stipulate how they will manage the project efficiently and effectively. This should include specific costs for project management time, to include update calls with the Carbon Trust Project Manager and/or ORJIP OSW Steering Group as required. This should also include production of a brief executive summary for the whole project, for internal dissemination. The budget should also accommodate the production of a final presentation and time dedicated to presenting this in the form of a webinar to invitees from the participants of ORJIP OSW including the Advisory Network.
Deliverable: D14: Monthly flash reports outlining work performed against WPs, forecasted progress, a risk log, and H&S incident register D15: Project executive summary D16: Delivery of webinar	

**WPB
Expenses**

The contractor should detail the capped amount of expenses it expects to incur throughout the project. Expenses will be paid as incurred and any unused balance will not be paid.

5. Intellectual Property and Knowledge

- 5.1. Full details of the intellectual property requirements and conditions can be found in the attached ORJIP Offshore Wind Stage II Contractors' Conditions.
- 5.2. The Carbon Trust and/or the ORJIP Offshore Wind Partners are able to make available the following input data, background IP or other resources to the successful Bidder for the purposes of the completing the Project, subject to the confidentiality conditions in the ORJIP Offshore Wind Stage II Contractors' Conditions:
 - i) None.

6. Bid Pricing

- 6.1. To provide Bidders with greater clarity on the nature, level and type of work involved in the various Work Packages, the Total Budget for the delivery of this Project is expected to range between £130-150k.
- 6.2. The Bid Price submitted with the Tender must be derived from the cost breakdown in the Bid Price Calculation Sheet, and must include all expenses. The Bid Price is the price for the activities that will address the Scope of Work (and any Alternative Work proposed by the Bidder). The Bid Price Calculation Sheet and the Bid Price shall not include the price of any Additional Work suggested by the Bidder. Instead, the price for such Additional Work Packages shall be stated separately to the Bid Price in the Main Bid Document.
- 6.3. If the Bid Price exceeds the expected range of the Total Budget as stated under section 6.1, to avoid receiving a lower score for criterion 4, in the Main Bid Document the Bidder should provide a clear and justified reason why the Bid Price exceeds the expected budget.
- 6.4. All costs and rates quoted in the Main Bid Document and Bid Price Calculation Sheet must be in GBP (£) and all staff rates quoted in the Tender must represent the **Day Rate** for employment of staff members.
- 6.5. Any expenses must be separately included under Expenses.

7. Tender Evaluation Criteria

Bidders should take the following evaluation criteria into account when preparing and submitting their tenders. In the event of equivalent scores of two or more received Tenders, suppliers and sub-contractors who have committed to decarbonisation targets (see end of this section) will be preferred.

CRITERION 1: APPROACH TO WORK (WEIGHTING: 20%)

<i>Description</i>	<i>Information required from Bidders</i>
Proposed Approach	In the Main Bid Document, Bidders are required to provide a clear and detailed description on how they plan to deliver the work for this Project. The description should include an initial overview on the approach followed by a description on how each Work Package and task will be delivered. Also, Bidders need to justify how their proposed approach meets the objectives of the Project.
Additional Work	If there is any Additional Work proposed by the Bidder, these aspects will be evaluated separately. The suggestion of Additional Work by the Bidder will not have a negative impact on the evaluation of the Tender.
Project management	Bidders are required to describe how they will manage the Project utilising appropriate resources and describe how they will work with the various stakeholders, such as the relevant PEP, to get information and manage potentially conflicting relationships.

CRITERION 2: EXPERIENCE (WEIGHTING: 30%)

<i>Description</i>	<i>Information required from Bidders</i>
Experience in marine benthic ecology	In the Main Bid Document, Bidders should elaborate on experience of the criteria described to the left and explain how these past experiences are relevant for this Tender. Of particular importance will be the Bidder's understanding of the policy environment and the need for this project. In addition, Bidders should provide at least two examples (with reference to specific roles, responsibilities and activities the Bidder undertook) of previous work which illustrates the Bidder's skills, capabilities, and experience in all of these areas (Bidders may wish to make reference to submitted examples of previous work for other clients). Bidders are advised that experience is considered a key important criterion and partnerships with other companies to support certain areas of experience are welcomed. All experience / case studies should be attached as an appendix to the Main Bid Document. Bidders should provide evidence of their relevant skills and experience. It is anticipated that the successful bidder will exhibit, among others, the following range of skills and experience:
Experience in offshore wind environmental impact assessments	
Experience in and knowledge of offshore wind consenting process	

	• Understanding of the requirements under EU and UK legislation; • Practical understanding of the offshore wind industry, including consenting/licensing processes and operation of offshore wind farms; • Understanding of conservation science, including marine benthic ecology expertise and knowledge of offshore wind farms; • A track record of satisfactory health, safety and quality management; • Experience of undertaking authoritative studies in relevant applied science areas; • Experience of reporting and presenting the results of studies in relevant applied science areas; • Experience and knowledge of offshore wind environmental impact assessments in relation to estimated impacts of offshore wind developments on benthic habitats • Knowledge of post-construction monitoring datasets Experience of working collaboratively with regulatory bodies and industry, ideally including the renewables industry and Statutory Nature Conservation Bodies.
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CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)

<i>Description</i>	<i>Information required from Bidders</i>
CVs/Resumes	Bidders are required to provide detailed CVs/Resumes for any key personnel who will be involved with this Contract together with proposed Project structure, intended position of the key personnel in the Project, and main responsibilities. CVs should include professional memberships of proposed staff working on this Project.
Applicable skills	Bidders should elaborate on the most relevant skills of the key personnel that will be involved in the Project.
Prior experience form involved staff	Please include examples of similar work performed by the proposed staff members, explaining how is relevant to the Approach to Work.
Expert engagement	A close working relationship with key stakeholders, such as government departments & agencies, regulatory bodies, statutory nature conservation bodies (SNCBs), non-governmental organisations (NGOs) and academia, who are seen relevant to the success of this Project. Please supply ideas of how these groups can be engaged and leveraged.

CRITERION 4: DATA ACQUISITION (WEIGHTING: 10%)

<i>Description</i>	<i>Information required from Bidders</i>
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Knowledge and experience of relevant source data	It is understood Bidders may not be able to commit to access or use of 3 rd party data without permission from the owner. A key criterion for scoring is that Bidders have a good understanding of what source data is likely to be available and who the owners are. Permission to use the data can be determined attained through coordination with ORJIP Offshore Wind.
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CRITERION 5: BID PRICE (WEIGHTING: 25%)

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

The Carbon Trust has committed to reaching Net Zero by 2050. Our associated targets have been validated by the Science Based Targets Initiative (SBTi)⁵. To meet the initial targets that we have set for ourselves, we encourage all our suppliers and sub-contractors to themselves have equivalent plans in place by 2026 at the latest. Measuring your emissions, setting targets, and encouraging others to do so will help push the needle on decarbonisation together.

Accordingly, we have included climate change commitment clauses in the ORJIP Stage II Contractors' Conditions. Bidders may submit Tenders even if they cannot meet the defined conditions now, but if this is the case this should be clearly flagged in the Tender Certificate

⁵ <https://sciencebasedtargets.org/>

as a requested change to the ORJIP Stage II Contractors' Conditions. Please reach out if you need more information on this.

8. Glossary

Approach to Work	Has the meaning given to it in section 3.1.
Additional Work	Any activities that are proposed by the Bidder in addition to those in the Scope of Work. It is at the discretion of the Carbon Trust to consider Additional Work in the evaluation of the Tender. The suggestion of Additional Work by the Bidder will not have a negative impact on the evaluation of the Tender.
Alternative Work	Deviations from the Scope of Work that are proposed by the Bidder, which replace work or tasks in the Scope of Work. Alternative Work will be treated as non-optional in the evaluation of the Tender.
Award Letter	A letter, issued by Carbon Trust, informing the Contractor about the award of the Contract. The Award Letter is issued together with the Final Scope of Work and the ORJIP Offshore Wind Stage II Contractors' Conditions.
Bidder	An individual, a company, an organisation or a consortium submitting a bid for the Project.
Bid Price	Has the meaning given to it in section 6.2. The total price for the Bidder to complete the Project in line with the Approach to Work. In the Tender, the Bid Price shall include the price for the delivery of all Work Packages described in the Scope of Work and any Alternative Work proposed by the Bidder. If any Additional Work is suggested by the Bidder, the price for the Additional Work shall be stated separate to the Bid Price.
Bid Price Calculation Sheet	An Excel template provided by the Carbon Trust that is to be provided by the Bidder in addition to the Main Bid Document.
Carbon Trust Project Manager	The Carbon Trust employee who serves as first point of contact in relation to this ITT and the Project.
Clarification Document	A document containing all received clarification questions and Carbon Trust's responses to these questions.
Contract	A document consisting of the Award Letter, the Final Scope of Work, the ORJIP Offshore Wind Stage II Contractors' Conditions, and any clarifications agreed in writing.
Contractor	The Bidder (or in the case of a consortium, Bidders) selected for the delivery of the Project.
Description of Tender	This document.
Due Diligence Questionnaire	A questionnaire that is to be completed by shortlisted Bidders should Carbon Trust's bidders vetting process give reason to

	conduct a due diligence. In case of a consortium, the Due Diligence Questionnaire is to be filled-in by the designated Project Coordinator.
Executive Summary Report	A 3-10 pages report containing a high-level description of the Work Programme and a summary of the relevant results, findings and conclusions of the Project.
Final Scope of Work	The agreed Work Programme for the Project, based on the Scope of Work and the Approach to Work, which is mutually agreed between the Carbon Trust and the Contractor.
Financial Proposal	Any financial information provided as part of the Tender, including the Bid Price and the Bid Price Calculation Sheet.
Flash Report	A template provided by the Carbon Trust at Project start.
Invitation to Tender (ITT)	The following group of documents: Description of Tender (this document); ORJIP Offshore Wind Stage II Contractors' Conditions; Tender Certificate template; Bid Price Calculation Sheet template; and Clarification Document (if applicable ⁶).
Main Bid Document	Has the meaning given to it in sections 3.1 and 3.2. No template is provided.
Project	The Benthic habitat changes post-construction of offshore wind: a strategic investigation or BenCh project.
Project Closeout Form	A template provided by the Carbon Trust towards the end of the Project.
Project Deliverables	The individual deliverables including, but not limited to, any reports, technical notes, documents, drawings, models, data, webinars to be produced by the Contractor according to the Scope of Work (see section 4) or as otherwise agreed in the Final Scope of Work.
ORJIP Offshore Wind	Offshore Renewables Joint Industry Programme for Offshore Wind
ORJIP Offshore Wind Partners	A group of leading offshore wind farm developers and public sector non-developers supporting ORJIP Offshore Wind.
ORJIP Offshore Wind Advisory Network	A network of stakeholders that voluntarily advise ORJIP offshore wind on the selection, implementation and delivery of ORJIP Offshore Wind projects.

ORJIP Offshore Wind Risk Model	The Contractor is not expected to produce a risk model of its own, but rather provide an estimate, with appropriate explanation, for potential risk reduction implications of the research undertaken within the frame of the delivered project. The Carbon Trust will provide a template to assist the Contractor in this process.
ORJIP Offshore Wind Risk Model Input Sheet	A form (to be provided by Carbon Trust) which the Contractor should complete in WPA to provide input into the ORJIP Offshore Wind Risk Model.
ORJIP Offshore Wind Steering Group	The Steering Group represents each of the ORJIP Offshore Wind partners and is the decision-making authority for ORJIP Offshore Wind projects.
Project Expert Panel or "PEP"	A group consisting of technical experts from the ORJIP Offshore Wind Advisory Network and ORJIP Offshore Wind Partners appointed by the ORJIP Offshore Wind Partners. The PEP will supervise the Project and where necessary make recommendation to the ORJIP Offshore Wind Steering Group.
Scope of Work	The (preliminary) Work Programme for the Project as defined in section 4 of this document. At Contract award, the Scope of Work will be replaced by the Final Scope of Work.
Technical Proposal	All parts of the Main Bid Document excluding the Financial Proposal.
Tender	Bidder's response to this ITT consisting of the following elements: - Main Bid Document (proposal); - signed Tender Certificate; and - Bid Price Calculation Sheet
Tender Certificate	A declaration that is to be provided by the Bidder (in case of a consortium: by the designated Project Coordinator) in addition to the Main Bid Document.
Total Budget	The expected amount of money available that will be made available from ORJIP Offshore Wind to the Contractor for the delivery the Project.
Work Package	A group of related tasks to be delivered under the Project.
Work Programme	The entirety of all Work Packages.