

12/04/2022

Dear Sir/Madam,

**Invitation to Tender for the Integration of tracking and at-sea survey data project for the Carbon Trust's Offshore Renewables Joint Industry Programme (ORJIP) for Offshore Wind**

You are invited to submit a tender for the Integration of tracking and at-sea survey data project (the "InTaS project" or "Project") which is part of the Offshore Renewables Joint Industry Programme (ORJIP) for Offshore Wind.

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

- Description of Tender (this document);
- UK seabird species included in conversation strategies with associated priority (.xcl)
- ORJIP Offshore Wind Stage II Contractors' Conditions;
- Tender Certificate (Word template);
- Bid Price Calculation Sheet (Excel template);
- Clarification Document (if applicable<sup>1</sup>);

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail address: [oliver.patrick@carbontrust.com](mailto:oliver.patrick@carbontrust.com)

Tenders must be submitted before 31/05/2022, 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	29/04/2022
Clarification Document published <sup>1</sup>	06/05/2022
Submission of full tender	31/05/2022, 12:00 BST
Bidder interviews	June 2022
Successful Contractor announcement	Late June 2022
Envisaged Contract award date	July 2022

Please e-mail any clarification questions, including questions about the timing of this ITT, to [oliver.patrick@carbontrust.com](mailto:oliver.patrick@carbontrust.com) any time before 29/04/2022. The complete set of clarification questions and all answers to clarification questions will be published in the Clarification Document on our website by 06/05/2022 and will hence be visible to all potential Bidders: <https://www.carbontrust.com/news-and-events/tenders>

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 A Clarification Document will not be published if no clarification questions are received in relation to this ITT.



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,

*Ol Patrick*

.....  
Oliver Patrick  
For and on behalf of **THE CARBON TRUST**

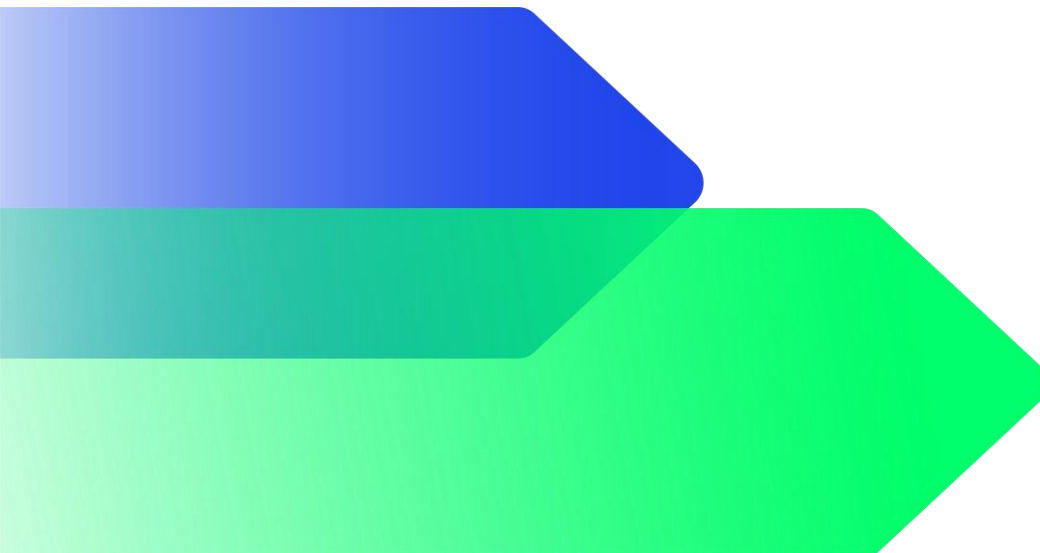
## Offshore Renewables Joint Industry Programme for Offshore Wind



## Invitation to Tender for the “Integration of tracking and at-sea survey data” Project

### Description of tender

April 2022



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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.

### Bid evaluation

The received bids will be evaluated by the Carbon Trust and the ORJIP Offshore Wind Partners against the criteria provided in section 8. A shortlist of Bidders will be created and invited for interview. Carbon Trust will do a 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 5 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 Integration of tracking and at-sea survey data 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 4, 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 make a bid. 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 (“ORJIP”) for Offshore Wind is a collaborative R&D programme between The Carbon Trust, EDF Energy Renewables Limited, Ocean Winds UK Limited, Equinor ASA, Ørsted Wind Power A/S, Red Rock Power Limited, RWE Renewables GmbH, Shell Global Solutions International B.V, SSE Renewables Developments UK Limited, TotalEnergies E&P UK Limited Crown Estate Scotland, The Scottish Ministers and The Crown Estate Commissioners (the latter 12 collectively referred to in this document as “ORJIP Offshore Wind Partners”).
- 1.2. The objective of the Carbon Trust ORJIP Offshore Wind programme 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 a Project Expert Panel (“PEP”).
- 1.5. This project will fall under the ‘impacts on ornithology, including displacement and collision risk’ 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 of the InTaS project**

- 2.1. At-sea surveys are performed to inform the assessment of potential impacts of an offshore wind farm development on seabirds and marine mammals. It’s important to accurately estimate the proportion of breeding vs. non-breeding birds in at-sea surveys to inform the Habitat Regulations Assessment (HRA). This project will integrate GPS tracking data collected on breeding birds with at-sea survey data to enable accurate estimation of the proportion of breeding birds within at-sea surveys, with proper quantification of uncertainty.

## **3. Aims and objective of the InTaS project**

- 3.1. The aims and objectives of the InTaS project are:
  - i. Integrate modelling of tracking data and at-sea survey data, allowing the distributions of breeding and non-breeding birds to be mapped.



- ii. Use densities of seabirds derived from at-sea data to apportion populations to breeding colonies (accounting for non-breeding birds), along with proper quantification of uncertainty.
- iii. Provide recommendations on how the resulting maps can be incorporated into apportioning tools (and hence into assessments of displacement and collision effects) and spatial mapping tools.
- iv. Define and develop a data integration framework that can be adapted to incorporate more wide-ranging data types.

#### **4. Tender documents for submission**

4.1. 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 Technical & Financial Proposal;
- ii. The signed Tender Certificate (pdf) – template provided; and
- iii. The filled-in Bid Price Calculation Sheet (xls) – template provided.

4.2. 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:

- i. The Bidder's proposed detailed Approach to Work (see section 5 and criterion 1 for more details). Bidders shall provide Work Package descriptions in the format set out in Annex 2 to this document. The Approach to Work should:
  - 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;
  - any Alternative Work (i.e. substitute activities to take place instead of certain activities outlined in the Scope of Work in section 5). 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
  - any Additional Work (i.e. activities to take place in addition to the activities outlined in the Scope of Work in section 5). 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. a pdf copy of the filled-in Bid Price Calculation Sheet;
  - iii. the offered Bid Price, including any cost assumptions deemed relevant by the Bidder – see section 6 and criterion 4 for more details;
  - iv. 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
  - v. 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.
- 4.3. The Tender Certificate must be signed by an authorised signatory. Bidders must fill in the provided template.
- 4.4. 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.
- 4.5. 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.

## **5. Scope of Work**

- 5.1. The Scope of Work is provided in this section 5.
- 5.2. The Scope of Work comprises 7 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.
- 5.3. It is expected that the Contractor will report on Project Deliverables to the ORJIP Offshore Wind Steering Group and Project Expert Panel. The Carbon Trust, ORJIP Offshore Wind Steering Group and Project Expert Panel 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.
- 5.4. 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.
- 5.5. 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 bid 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.

- 5.6. The Carbon Trust appreciates that it will take a small, interdisciplinary team of mixed seniority approximately 12 months to complete the Project.
- 5.7. 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.
- 5.8. 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 InTaS Project, any assumptions will be discussed with the ORJIP Offshore Wind Steering Group and Project Expert Panel prior to the start of each Work Package.

## Work Packages

Work package	Description of work
<b>WP1</b> <b>Data collation and review</b>	<p><b>Goal</b></p> <p>Collate available tracking and at-sea survey data for priority species across all UK waters and perform a qualitative review of data quality.</p> <p>The list of species to be included will be agreed following discussions with the ORJIP Steering Group and the PEP. The Contractor should take into consideration species most affected by the current development pipeline for offshore wind in the UK, and those expected to be most affected by the future build-out scenarios for fixed-bottom and floating offshore wind in the UK. A preliminary list of species included in UK seabird conservation strategies has been appended and includes an initial priority ranking that the Contractor should consider in their tender response.</p> <p><b>Activity</b></p> <ol style="list-style-type: none"> <li><b>1. Collate tracking data for high-priority species across the whole of the UK.</b> This should include tracking data conducted within and outside of offshore wind project development and, where possible, incorporate tracking data being collected in current or planned leasing rounds (e.g., England Round 4, ScotWind).</li> <li><b>2. Collate available at-sea survey data for high-priority species</b> This should include project-level data as well as larger available datasets (e.g., MERP, SeaMaST), and ongoing surveys should be incorporated where data permissions can be obtained. A summary table of available at-sea survey data should be provided, and the Contractor should reference known ongoing or planned surveys that could not be included in this study with commentary of their perceived future value.</li> <li><b>3. Perform an appraisal of tracking and at-sea survey data quality.</b> <b>Tagging:</b> The appraisal should cover key parameters related to spatial and behavioural data, and include both quantitative (e.g., fix frequency, fix accuracy, duration of data collection) and qualitative features (e.g., technology and tagging type, availability) to provide a holistic understanding of each dataset with associated usability and limitations (inc. sample size, temporal and spatial coverage).  <b>At-sea surveys:</b> Quantitative (e.g., coverage, resolution, age) and qualitative (e.g., platform, methodology) features should be assessed to clearly understand the spatial and temporal coverage of the collated survey data and the associated usability and limitations. The appraisal should consider the interaction of datasets and how project-level data can complement larger available datasets (e.g. MERP, SeaMaST) where available.  Within tenders, contractors should provide a list of proposed parameters with justification for their value in the data appraisal for both tagging and at-sea survey data. The Contractor should take a hierarchical approach to prioritise the best-quality data, with results presented at a regional and species level.</li> </ol>

Data limitations should be clearly identified and communicated.

#### 4. Data cleansing

Where necessary, the contractor should reprocess datasets into a clean and standardised format that permits data interrogation and analysis.

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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 steering group may be able to facilitate data availability from developers.

## Deliverables

**D01: A detailed summary report outlining the review findings.**

**Presentation of results to the ORJIP SG and PEP.**

### WP2 – Develop data integration framework

#### Goal

Evaluate existing approaches and develop new approaches to integrate data types into a single framework that quantifies uncertainty. The framework should be capable of integrating data at a project-level and plan-level and be future-proofed to accept additional datasets post-development.

#### Activity

##### 1. Evaluate existing approaches

Perform a critical review of relevant data integration frameworks and appraise their suitability in relation to the data collected in WP1. The review should include how the approaches consider: differences in aerial survey methods, bias in at-sea survey data, and the quantification and presentation of uncertainty. Contractors should demonstrate their understanding of the required datasets in their proposal and outline the perceived constraints of integrating various combinations of data types and how this will be managed during project delivery.

The Contractor should consider expected developments in data collection and survey methods (e.g., digital aerial surveys, LiDAR, UAVs) and assess the functionality of frameworks in accepting datasets post-development.

##### 2. Develop a data integration framework

Leveraging suitable existing approaches, develop a framework that allows for the integration of tracking data and at-sea survey data to map the distributions of breeding and non-breeding birds with quantification of uncertainty. The framework should consider integration at a project-level **and** plan-level:

**Project-level:** Capable of integrating survey data from an individual development with tracking datasets, to be usable by a technical consultant during environmental assessments.

**Plan-level:** Capable of integrating macro-level data sets (e.g., MERP, SeaMast) to inform plan-level assessments and early-stage scoping for offshore renewable zones/projects. It is envisaged that this will be a more static output e.g., for use in Marine Spatial Planning assessments.

A statistical approach to data integration is expected and final deliverables should be supported by a user-friendly interface.

**The framework should be designed to be compatible with current apportioning tools (e.g., the Cumulative Effects Framework) and be future proofed with the ability to accept additional datasets. Guidance for users should be provided alongside the framework to permit future use (e.g., required data formatting).**

The Contractor is encouraged to use the work of Matthiopoulos et al.<sup>1</sup> as a guide to data integration.

## Deliverables

### D02: An evaluation of existing approaches to data integration

**Data integration framework**

**Presentation of results to the ORJIP SG and PEP.**

## WP3 – Interim workshop and framework testing

### Goal

Present the draft data integration framework and seek expert input to review and improve the data integration framework.

### Activity

#### 1. Workshop hosting

Organise and facilitate a workshop with the ORJIP SG, the Project Expert Panel, and other sectoral experts to present and receive structured feedback on the data integration framework. The workshop is expected to consider questions such as:

- *What distribution maps should be produced from the data?*
- *What format should the outputs be provided in, and to what resolution?*
- *How should uncertainty be presented in the outputs?*
- *What are the hosting requirements and intentions (inc. additional interface requirements)?*

#### 2. Framework testing

Arrange for a focus group to complete active testing of the framework and provide feedback.

<sup>1</sup> Matthiopoulos, J., Wakefield, E., Jeglinski, J. W., Furness, R. W., Trinder, M., Tyler, G., Mccluskie, A., Allen, S., Braithwaite, J. & Evans, T. (2022). Integrated modelling of seabird-habitat associations from multi-platform data: A review. *Journal of Applied Ecology*, 00, 1– 12. <https://doi.org/10.1111/1365-2664.14114>

<b>3. Framework iteration</b>  Make necessary changes to the framework based on workshop and testing feedback.	
<b>Deliverables</b> <b>D03: Workshop and testing materials, minutes and updated framework following receipt of comments</b> <b>Presentation of results to the ORJIP SG and PEP.</b> <b>Final framework and hosting specification.</b>	
<b>WP4 –Distribution mapping</b>	<b>Goal</b>  Apply framework to data, producing species distribution maps with uncertainty quantified.
	<b>Activity</b>  <b>1. Data integration</b>  Integrate tracking and at-sea survey data using the developed framework.  <b>2. Produce distribution maps agreed at project workshop</b>  Use densities derived from at-sea data to be apportioned to breeding colonies (accounting for non-breeding birds), along with proper quantification of uncertainty. The distribution maps should be developed in the agreed format and permit seasonal analysis – season definitions should account for latitudinal variation and consider SPA and regional definitions before defaulting to UK-wide seasons.
	<b>Deliverables</b> <b>D04: Summary report included a set of priority distribution maps</b>  <b>Distribution maps available via a web-hosted platform (e.g., ArcGIS online). <i>Contractors should include this as 'additional work' with a separate quote if it is not viewed as deliverable within the quoted budget (optional pending SG approval).</i></b> <b>Presentation of results to the ORJIP SG and PEP.</b>
<b>WP5 – Recommendations for future work</b>	<b>Goal</b>  Identify and prioritise future work to improve the apportioning of seabirds (both breeding and non-breeding).
	<b>Activity</b>  <b>1. Identify species-level data gaps</b>  Tabulate available data for high-priority species and identify the data necessary to improve year-round apportioning. Provide commentary on the extent to which data gaps can be closed and the limitations (including practical considerations) to doing so.

<p><b>2. Prioritise future work recommendations to close data gaps</b></p> <p>The Contractor should provide an assessment of future work opportunities, with commentary on the perceived priority for each opportunity. The assessment should consider planned/ongoing work not available for inclusion in this study but anticipated to close identified evidence gaps in the future.</p>	
<p><b>Deliverables</b></p> <p><b>D05: Final report outlining the outputs of the project and recommendations for future work.</b></p> <p><b>Presentation of results to the ORJIP SG and PEP.</b></p>	
<p><b>WP6</b></p> <p><b>Project Validation</b></p>	<p><b>Goal</b></p> <p>To provide a 3rd party review of the project deliverables to assess its accuracy and identify any shortfalls to progress the final report as a scientific publication</p> <p><b>Activity</b></p> <p>Conduct Peer Review including:</p> <ul style="list-style-type: none"> <li>a. An independent review of project and outputs, including quality assurance of the underlying code.</li> <li>b. Publication of scientific report</li> </ul> <p>Proposals should set out the intended approach to peer review, including details such as the proposed publication.</p>
<p><b>Deliverables</b></p> <p><b>D06: A short report outlining the validity of the project and outputs</b></p> <p><b>Publication of scientific peer reviewed report (publication is at the discretion of the ORJIP Steering Group. Contractors should indicate any in-kind contribution that can be provided towards publication services in their tender response).</b></p>	
<p><b>WP7</b></p> <p><b>Ongoing support</b></p>	<p><b>Goal</b></p> <p>Develop an ongoing support system to assist users of the framework.</p> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>- Develop a comprehensive set of instructions and FAQs for the framework. This should include guidance for how future datasets can be integrated and common troubleshooting issues.</li> <li>- Provide ongoing technical support following the delivery of the framework. Contractors should outline how the support service will be managed (e.g., nature of support, timeline of support, expected response times) in their tender.</li> </ul>
<p><b>Deliverables</b></p>	



**D07: Ongoing support structure (inc. guidance documents, FAQs, and support service)****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.

Finally, if appropriate, resource should also be allocated to provide inputs into the 'ORJIP Risk Model'. The contractor is expected to produce a risk register and provide guidance on the effect of the research on inputs to the 'ORJIP Risk Model'.

**Deliverables:**

**D08: Monthly flash reports outlining work performed against WPs, forecasted progress, a risk log, and H&S incident register.**

**D09: Project executive summary**

**D10: Delivery of webinar**

**D11: Project Risk Register inputs**

**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.

## **6. Intellectual Property and Knowledge**

Full details of the intellectual property requirements and conditions can be found in the attached ORJIP Offshore Wind Stage II Contractors' Conditions.

## **7. Bid Pricing**

- 7.1. 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 **£100,000 - £120,000**.
- 7.2. 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.
- 7.3. 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.
- 7.4. 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.
- 7.5. Any expenses must be separately included under Expenses.

## 8. Tender Evaluation Criteria

Bidders should take the following evaluation criteria into account when preparing and submitting their tenders.

### Criterion 1: Approach to Work (Weighting: 25%)

<i>Description</i>	<i>Information required from Bidders</i>
Proposed Approach	<p>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.</p> <p>The description should include an initial overview on the approach followed by a description on how each Work Package and task will be delivered.</p> <p>Also, Bidders need to justify how their proposed approach meets the objectives of the Project.</p>
Additional Work	<p>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.</p>
Project management	<p>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 ORJIP Offshore Wind PEP, to get information and manage potentially conflicting relationships.</p>

### Criterion 2: Experience (Weighting: 30%)

<i>Description</i>	<i>Information required from Bidders</i>
Experience and knowledge	<p>In the Main Bid Document, Bidders should elaborate on experience of the criteria described and explain how these past experiences are relevant for this tender. Of particular importance will be the Bidders understanding of the policy environment and the need for this project.</p> <p>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).</p> <p>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.</p> <p>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:</p>

	<ul style="list-style-type: none"> <li>• Understanding of the requirements under EU and UK legislation;</li> <li>• Practical understanding of the offshore wind industry, including consenting/licensing processes and how InTaS fits into the impact assessment process;</li> <li>• A track record of satisfactory health, safety and quality management;</li> <li>• Experience of undertaking authoritative studies in relevant applied science areas;</li> <li>• Experience of reporting and presenting the results of studies in relevant applied science areas;</li> <li>• Experience of applying statistical skills to the design and undertaking of relevant studies;</li> <li>• Comprehensive knowledge of and experience using tagging and at-sea survey data, and other large datasets;</li> <li>• Ornithological expertise to understand seabird behaviour (e.g., consequences of tag attachment).</li> </ul> <p>Experience of working collaboratively with regulatory bodies and industry, ideally including the renewables industry and Statutory Nature Conservation Bodies.</p>
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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, 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 tenderers may not be able to commit to access or use of 3 <sup>rd</sup> party data without permission from the owner. A key criterion for scoring is that tenderers 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: 20%)**

<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	<p>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 6.</p> <p>Bidders are required to specify expected expenses separate from the estimated budget for each Work Package.</p> <p>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).</p> <p>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.</p> <p>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 &amp; subsistence cost exceeding £200 per day.</p> <p>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.</p>

## 9. Glossary

Approach to Work	Has the meaning set out 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	The total price for the Bidder to complete the Project in line with the Approach to Work. The Bid Price shall include the price for all Work Packages described in the Scope of Work and any Alternative work proposed by the Bidder. The Bid Price shall not include the price of any Additional Work suggested by the Bidder.
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.
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 <sup>2</sup> ).
Main Bid Document	Has the meaning given in section 3.1. No template is provided.
Project	The Integration of tracking and at-sea survey data or InTaS 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 5) 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 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.

Project Expert Panel	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.
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.