

14th October 2025

Dear Sir/Madam,

Invitation to Tender for the Impact of SF6-free Regulations and Emerging of Alternative Solutions on Offshore Wind Farm Design and Operation project for the Carbon Trust's OWA Programme

You are invited to submit a Tender for the Impact of SF6-free Regulations and Emerging of Alternative Solutions on Offshore Wind Farm Design and Operation project (the "SF6 project" or "Project") which is part of the Offshore Wind Accelerator (OWA) programme. The key objective of the Project is to understand the operational implications of emerging SF6-free regulations and to evaluate available alternatives for high-voltage switchgear in the offshore wind sector. A key focus will be on understanding the regulatory and practical challenges associated with the parallel use of SF6-based and SF6-free technologies during the transition period, including the technical and logistical feasibility of retrofitting or replacing existing SF6 switchgear with SF6-free solutions in high-voltage operational offshore wind and transmission switchgear assets.

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

- Description of Tender (this document);
- OWA Stage IV Contractors' Conditions;
- Tender Certificate (Word template);
- Bid Price Calculation Sheet (Excel template);
- Clarification Document (if applicable¹);
- Project Closeout Form (for information purposes only – no need to complete now); and
- OWA Cost Model Input Sheet (for information purposes only – no need to complete now).

Unless informed to the contrary, tenders and communications shall be sent by e-mail to the following e-mail address: james.inkpen@carbontrust.com and ciara.ritson-courtney@carbontrust.com

Tenders must be submitted before 11th November 2025 11:00am GMT. 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	28 th October 2025
Clarification Document published ¹	4 th November 2025
Submission of full Tender	11 th November 11:00 am GMT
Bidder interviews	24 th November 2025
Successful Contractor announcement	1st December 2025

¹ A Clarification Document will not be published if no clarification questions are received in relation to this ITT.

Envisaged Contract award date

1st December 2025

Please e-mail any clarification questions, including questions about the timing of this ITT, to james.inkpen@carbontrust.com and ciara.ritson-courtney@carbontrust.com any time before 28th October 2025. The complete set of clarification questions and all answers to clarification questions will be published in the Clarification Document on our website by 4th November 2025 and will hence be visible to all potential Bidders: <https://www.carbontrust.com/news-and-events/tenders>

For information about the OWA programme, please see the Carbon Trust's website:
<https://www.carbontrust.com/our-projects/offshore-wind-accelerator-owa>

We look forward to receiving your Tender.

Yours sincerely,

.....
James Inkpen and Ciara Ritson-Courtney
For and on behalf of **THE CARBON TRUST**

THE CARBON TRUST OFFSHORE WIND ACCELERATOR

Invitation to Tender for the “Impact of SF6-free
Regulations and Emerging of Alternative Solutions on
Offshore Wind Farm Design and Operation” Project

Description of Tender

Contents

KEY INFORMATION	0
PROJECT DETAILS	0
KEY DATES	0
IMPORTANT INFORMATION FOR BIDDERS	4
1. Introduction to the Offshore Wind Accelerator.....	6
2. Background and objective of the SF6 project.....	7
3. Tender documents for submission.....	8
4. Scope of Work.....	9
5. Intellectual Property, Knowledge and Input Data	15
6. Bid Pricing	16
7. Tender Evaluation Criteria.....	17
CRITERION 1: APPROACH TO WORK (WEIGHTING: 35%)	17
CRITERION 2: EXPERIENCE (WEIGHTING: 30%)	17
CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)	18
CRITERION 4: BID PRICE (WEIGHTING: 20%)	18
8. Glossary.....	20

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 OWA Partners against the criteria provided in section 7 and the Bidder authorises the Carbon Trust to share its submitted Tender with the OWA Partners for this purpose. 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 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 OWA Stage IV Contractors' Conditions, and any clarifications agreed in writing. The Award Letter, the Final Scope of Work, the OWA Stage IV Contractors' Conditions, and any clarifications agreed in writing will establish the Contract for the Impact of SF6-free Regulations and Emerging of Alternative Solutions on Offshore Wind Farm Design and Operation project (the "**Contract**") between You and the Carbon Trust. With the exception of any minor amendments to the OWA Stage IV Contractors' Conditions which may be requested by the Bidder, the submission of a Tender shall constitute unqualified acceptance of the OWA Stage IV Contractors' Conditions. In the event that minor amendments to the OWA Stage IV 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 Wind Accelerator

- 1.1 The Offshore Wind Accelerator (“**OWA**”) is an industry-driven collaborative research, development and demonstration programme which was initially launched by the Carbon Trust in 2008 in collaboration with five offshore wind developers. The programme has since expanded during OWA Stages I, II, III and IV to include currently nine offshore wind developers from various countries within the European Economic Area (the “**OWA Partners**”). At the time of issue of this Invitation to Tender the OWA Partners are: SSE Renewables Developments (UK) Limited, Ørsted Wind Power A/S, RWE Offshore Wind GmbH, ScottishPower Renewables (UK) Limited, Equinor ASA, Vattenfall Vindkraft A/S, EnBW Energie Baden-Württemberg AG, Shell Global Solutions International B.V., TotalEnergies OneTech and bp Low Carbon Development Company Limited.
- 1.2 OWA Stage IV aims to continue the cost reduction of offshore wind to make it cost competitive with other sources of energy generation, overcome market barriers, develop industry best practice, trigger the development of new industry standards and support the international expansion of offshore wind.
- 1.3 Research under the OWA currently falls into five research areas: Cables, Electricals, Foundations, Logistics and O&M, and Energy Yield & Performance. Research, development and demonstration projects are carried out in each of the five research areas to address technology challenges. This Invitation to Tender is related to the OWA research area Electricals.
- 1.4 Each of the five research areas is managed by the Carbon Trust and governed by a Technical Working Group (“**TWG**”) consisting of technical experts appointed by the OWA Partners. The TWG Electricals will supervise the Project, provide technical direction and guidance to the Contractor (where needed) and review the Project Deliverables, findings and other outcomes.
- 1.5 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 SF6 project

- 2.1 The OWA TWG Electricals would like to investigate the operational implications of emerging SF6-free regulations and to evaluate available alternatives for high-voltage switchgear in the offshore wind sector.
- 2.2 The transition to SF6-free Gas-Insulated Switchgear (GIS) is accelerating, driven by increasing awareness of the high global warming potential of SF6 and the tightening of environmental regulations. As legislation aimed at phasing out SF6 comes into effect in several key markets, the offshore wind industry currently navigating a transitional phase. During this period, both conventional SF6-based and newer SF6-free switchgear technologies are required to coexist within the same asset portfolios.

This shift presents operational challenges, particularly in ensuring long-term maintainability and reliability across a mixed-technology landscape. It is therefore critical for offshore wind developers to plan for the full lifecycle of both technologies, ensuring that appropriate technical expertise, maintenance procedures, and spare parts are in place to support continued safe and efficient operation of all assets.

- 2.3 A key focus of this work will be to understand the regulatory and practical challenges associated with the parallel use of SF6-based and SF6-free technologies during the transition period.

The project will also examine the technical and logistical feasibility of retrofitting or replacing existing SF6 switchgear with SF6-free solutions in high-voltage (minimum 11 kV) operational offshore wind and transmission switchgear assets. Based on these findings, the project will deliver a set of standardised guidelines and processes to support offshore wind developers in managing this transition. These resources will aim to provide clarity on compliance, operational continuity, and long-term maintainability across mixed-technology environments.

- 2.4 The expected benefits of this work are:

- To ensure regulatory compliance through the provision of market specific clarity on SF6 regulatory requirements.
- To provide insights into the real-world implications of transitioning to SF6-free GIS.
- To provide guidance on mixed fleet management strategies of SF6 and SF6-free GIS.
- To inform project development decisions in relation to future-proofing assets to align with expected regulations.

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;
- 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:

- i. The Bidder's proposed detailed Approach to Work (see section 4 and criterion 1 for more details). 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;
 - specify any input data, background IP, hardware or other inputs that the Bidder requires the Carbon Trust and/or the OWA 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). 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). 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.

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 in this section 4.
- 4.2 The Scope of Work comprises 4 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 TWG. The Carbon Trust and TWG 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 12 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 SF6 Project, any assumptions will be discussed with the TWG prior to the start of each Work Package.

Work Packages

Work Package	Description of work
WP1: Technology and Regulation Literature Review	The successful contractor will undertake a targeted literature review to establish a clear understanding of the current state of technology and regulatory developments related to SF6-free GIS, including HVDC GIS, with a specific focus on applications relevant to high-voltage offshore wind assets and relevant transmission assets (minimum 11 kV). The This work package will underpin subsequent work packages by identifying key themes, emerging trends, knowledge gaps, and areas requiring stakeholder input. The literature review should include (but not limited to): • Review of academic and industry literature on SF6-free technologies, including: ○ Studies on environmental impacts ○ Performance metrics ○ Lifecycle assessments ○ SF6-free specific tests and technology validation requirements ○ Human health implications including a comparison of the alternative gases used in SF6-free GIS • Review of regulatory and policy documents from UK, EU and other key markets including US, Norway, Korea, Australia and Japan, highlighting implementation timelines, compliance thresholds and any transitional or derogation provisions • Identification and summary of the main SF6-free GIS technologies and 'hybrid' SF6/SF6-free technologies that are currently available or under development with relevant timelines provided where appropriate including information on the manufactures, development and commercialisation timelines, technology readiness level (TRL) assessments, alignment to regulations and any real-world deployment case studies of both 'hybrid' and SF6-free solutions. A consideration of the use of PFAs in SF6-free technologies should also be provided. • Review of the literature on the operational and maintenance implications of SF6-free GIS, including aspects such as maintenance requirements, reliability records, reporting capabilities, supply chain considerations, safety protocols, health risks and training requirements. • Summary of the known operational, logistical and technical challenges associated with operating mixed fleets of SF₆ and SF₆-free switchgear, along with documented or proposed mitigation strategies • Gap analysis identifying where further investigation and stakeholder engagement is required. • Review of the GIS supply chain, including the potential risks of an increasingly complex supply chain and identifying mitigations and opportunities for standardisation • This should consider the work being undertaken by the Energy Institute.

	The technology and literature review should be comprehensive, yet concise and primarily focus on research that is well established and has reached a high level of maturity. General background on the environmental impact of SF6 is well understood and should be excluded from the literature review. In-depth technical analysis of the physical or chemical mechanisms of alternative insulation gases unless directly relevant to operational performance or deployment decisions should also be excluded from the review.
Project Deliverables: - D01: Regulation and Literature Review - D02: Presentation to TWG-E	
WP2: Stakeholder Engagement	To assist with the completion of all work packages, the contractor should perform a stakeholder engagement exercise to build upon the literature review completed in Work Package 1. The focus of this stakeholder engagement exercise should be to understand the main SF6-free GIS technologies currently available or under development, as well as the current challenges with SF6-free regulations, and its impact on the Offshore Wind industry with: • Offshore wind developers • Grid operators and regulators to understand future and emerging requirements • OEMs and switchgear suppliers to gain an understanding on the availability of compliant equipment and the roadmap for SF6-free technology alternatives • Maintenance contractors and service suppliers to provide an assessment on the feasibility and complexity of the refurbishment of already installed assets (OSS, WTGs, etc.), including an assessment on the risk of SF6 leakage during refurbishment. To perform this, the contractor is expected to provide a stakeholder engagement plan to the OWA partners, and this should be agreed with partners prior to proceeding with stakeholder engagement. This should include: • List of stakeholders • List of questions • Method to approach stakeholders • Information that will be shared/discussed The contractor should organise and facilitate separate workshops with OWA partners, OEMs, regulators, grid operators, maintenance contractors and service suppliers to review and discuss the current

	roadmap for SF6 free GIS, regulatory implantation challenges and solutions for addressing the challenges identified. The contractor may propose further engagement throughout the whole project such as interviews, workshops, questionnaires, and surveys.
Project Deliverables: - D03: Stakeholder Engagement Plan - D04: Stakeholder Workshop - D05: Stakeholder Engagement Report - D06: TWG-E Presentation	
WP3: Regulatory Impact Analysis of SF6 regulations, and their impacts for the Offshore Wind industry	The contractor should provide a comprehensive analysis of the current and future regulatory landscape governing the use of SF6 in high-voltage equipment, with a focus on its implications for the offshore wind sector. The aim is to clarify how regulatory developments will influence technology selection, procurement, operational planning, and risk management across new and existing offshore wind projects. In the analysis, the contractor should cover the following topics and areas of interest: • Regulatory Review and Interpretation - analyse the scope, timelines, and technical thresholds of SF₆ phase-out regulations in the EU and UK. Clarify differences in regulatory approaches between jurisdictions and their implications for cross-border offshore wind projects. • Impact on New and Existing Offshore Wind Assets - evaluate how phased bans affect procurement, design, and commissioning of new offshore wind farms. Operational and Commercial Risks - identify risks related to regulatory non-compliance, technology obsolescence and legacy asset management, spare parts and maintenance capability for SF6-based systems, supply chain or lead-time issues for SF6-free alternatives and potential cost implications associated with retrofit, early replacement, or mixed-fleet strategies. The longevity of operational and maintenance support for SF6 assets should also be considered, with consideration given to restrictions governing the use of recycled/reclaimed SF6 for maintenance in certain markets. The Report should also include a summary of the regulatory landscape in each region, including relevant information for each of the key markets listed. This should include, but is not limited to, a timeline/roadmap for the implementation SF6-free alternatives for each key market and any relevant market specific exemptions.
Project Deliverables: - D07: SF6 Regulatory Impact Analysis on the Offshore Wind Industry Report	

- D08: Presentation to TWG-E	
WP4: Guideline Document	Based on the outcome of all previous work packages and based on feedback from the TWG-E, the contractor should produce a guideline document to support offshore wind developers in navigating the transition from SF6-based to SF6-free GIS. The guideline document should be immediately usable by technical and operational stakeholders, and will synthesise findings from the literature review, stakeholder engagement, and regulatory analysis work packages to support informed decision-making across the asset lifecycle. The guideline document should include, but is not limited to, the following: • Practical and operational implications of the regulations discussed in the literature review, based on comments from TWG-E and through previous stakeholder engagement activities • Best practice guidance, including recommendations for offshore wind developers on how to interpret and respond to the evolving regulatory landscape, including procurement, design, operational planning, and compliance strategies • Operational and technical considerations, providing insights into the real-world implications of transitioning to SF6-free GIS, including maintenance and inspection practices, spare parts and logistical planning and safety considerations. • Mixed-fleet management strategies, providing practical recommendations for managing assets with a combination of SF6 and SF6-free GIS, including guidance on lifecycle planning, inventory management, and maintenance scheduling. • Decision-support tools, including a flowchart or decision tree to guide GIS technology and vendor selection based on project timing, regulatory requirements, and asset characteristics Strategies for managing mixed fleets of SF6 and SF6-free GIS should also be included, including recommendations for spare parts management and maintenance planning. The document should include a flowchart/guide for the selection of GIS vendors based on current and future regulations which is specific to offshore wind farm developers.
Project Deliverables: - D09: Guideline Document - D10: Presentation to TWG-E	

WPA. Project Management	The Bidder should stipulate how it will manage the Project efficiently and effectively. In particular, the following activities should be included (and hence budgeted for) • project management time (including sufficient time for review processes); • regular update calls with the Carbon Trust Project Manager and/or Technical Working Group as required; • the preparation of monthly flash reports (Carbon Trust template) containing key financial data and information of the delivery status of the Project; and • towards the end of the Project ○ the production of a 3-10 pages Executive Summary Report for the entire Project (for dissemination within the OWA); ○ the preparation of a Project Closeout Form (Carbon Trust template) which includes a short summary of areas for future research and documentation of all Project Deliverables; ○ the preparation of a final presentation to the TWG; ○ time dedicated to presenting the main results, findings, and outcomes of the Project in the form of a 1-hour webinar to OWA Partners; and ○ the provision of inputs for the OWA Cost Model by completing the OWA Cost Model Input Sheet (Carbon Trust template). Bidders should be aware that the Carbon Trust and TWG usually require 2-3 weeks to review and provide feedback on each Project Deliverable, with at least one round of review comments to be accommodated. This should be considered when calculating Your Bid Price.
Project Deliverables: - D11: Monthly flash reports - D12: Executive Summary Report - D13: Final presentation - D14: Delivery of webinar - D15: Project Closeout Form - D16: Input sheet for OWA Cost Model	
Expenses	The Bidder should detail the amount of expenses it expects to incur throughout the Project. Expenses will be paid as incurred up to the amount specified and any unused balance will not be paid.

5. Intellectual Property, Knowledge and Input Data

- 5.1 Full details of the intellectual property requirements and conditions can be found in the attached OWA Stage IV Contractors' Conditions.
- 5.2 The Carbon Trust and/or the OWA 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 OWA Stage IV Contractors' Conditions:
 - a. 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 £60k and £70k
- 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

7.1. Technical & Financial Evaluation

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: 35%)

Description	Information required from Bidders
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 OWA TWG, to get information and manage potentially conflicting relationships.

CRITERION 2: EXPERIENCE (WEIGHTING: 30%)

Description	Information required from Bidders
Experience in and knowledge of SF6 and SF6 free switchgear technologies	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.
Experience in asset management and maintenance within an offshore wind context	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).
Experience in and knowledge of international environmental and regulatory compliance	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.

CRITERION 3: STAFF SKILLS (WEIGHTING: 15%)

Description	Information required from Bidders
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 offshore wind farm developers, grid operators and regulators, OEMs and switchgear suppliers and maintenance contractors, as well as the OWA Technical Working Group are seen relevant to the success of this Project. Please supply ideas of how these groups can be engaged and leveraged.

CRITERION 4: BID PRICE (WEIGHTING: 20%)

Description	Information required from Bidders
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.

7.2. Contractual Evaluation

Bidders are required to state any requested amendments to the OWA Stage IV Contractors' Conditions in their Tender Certificate. Any requests for amendments made after submission of the offer (i.e. not included in the Tender Certificate) shall not be considered by the Carbon Trust. On the basis of any changes requested in the Tender Certificate, the Carbon Trust may reject any bids where they consider there to be a high risk of not agreeing a contract in a timely manner.

The Carbon Trust has committed to reaching Net Zero by 2050. Our associated targets have been validated by the Science Based Targets Initiative (SBTi)². To meet the initial targets that we have set for ourselves, we encourage all our suppliers and sub-contractors to 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 OWA Stage IV 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 as a requested change to the OWA Stage IV Contractors' Conditions. Please reach out if you need more information on this.

² <https://sciencebasedtargets.org/>

8. 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 OWA Stage IV 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 the delivery of 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 OWA Stage IV 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. Information can be taken from summaries written for previous Work Packages
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); OWA Stage IV Contractors' Conditions; Tender Certificate template; Bid Price Calculation Sheet template; and Clarification Document (if applicable ³).
Main Bid Document	Has the meaning given in section 3.1. No template is provided.
Project	The Impact of SF6-free Regulations and Emerging of Alternative Solutions on Offshore Wind Farm Design and Operation or SF6 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.

³ A Clarification Document will not be published if no clarification questions are received in relation to this ITT.

OWA	Offshore Wind Accelerator
OWA Partners	A group of leading offshore wind farm developers supporting the OWA.
OWA Cost Model	The Contractor is not expected to produce a cost model of its own, but rather provide an estimate, with appropriate explanation, for potential cost 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.
OWA Cost Model Input Sheet	A form (to be provided by Carbon Trust) which the Contractor should complete in WPA to provide input into the OWA Cost Model.
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 Working Group (TWG)	A group consisting of technical experts appointed by the OWA Partners. The TWG will supervise the Project.
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 the OWA programme 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.