**Invitation to Tender**

ERDF HAES Energy Modelling Consultancy

**Introduction**

Procure Plus requires energy modelling consultancy support to aid the delivery of the Homes as Energy Systems project, which is part-financed by the European Regional Development Fund.

Consultants wishing to bid for this opportunity should carefully read the Consultancy Brief below and make their submissions via email to: [support@procure-plus.com](mailto:support@procure-plus.com). Email submissions are to include the following reference: **ERDF Energy Modelling Consultancy Tender.**

Submissions will be assessed on the tendered sum contained in their proposal (50%) and their written answers to the quality evaluation (50%) which will assess bidders’ knowledge, skills and proposed approach to delivering the requirement against the consultancy brief.

The quality evaluation will be combined separately with the tendered sum to identify the most economically advantageous proposal. This will result in the appointment of one bidder.

Prices are to be fixed for the duration of the contract.

**The deadline for submissions is 15:00 on Tuesday 5 November 2019.**

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| **Brief summary:** | Homes as Energy Systems consultancy: energy modelling, revenue mapping and carbon saving interventions | **Date:** | October 2019 |
| **Reporting line:** | Sustainability and Growth | **Estimated value:** | £90,000.00 |
| **Resource requirement:** | To be proposed by the successful consultancy | **Contract duration:** | 20 months starting in January 2020 |
| **Location:** | Working remotely. Attendance at periodic meetings in the Greater Manchester City Region will be required. | **Expenses:** | Quotations for this service provision should be inclusive of all disbursements, including travel expenses. |

**Contact details:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Organisation** | **Email** |
| Support | Procure Plus | [support@procure-plus.com](mailto:support@procure-plus.com) |

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| Consultancy Brief |
| Procure Plus is the accountable body for a multimillion-pound European Regional Development Fund (ERDF) funded project, Homes as Energy Systems (HAES).  A critical element of this project centres on the aggregation and control of energy stores, both electrical battery systems (a small number) and a combination of Ground Source Heat Pumps (GSHP) and Air Source Heat Pumps (ASHP).  A named project Delivery Partner, Upside Energy, is responsible for defining overall architecture and communications protocols between its cloud service and the energy storage assets as well as gathering data from and sending control signals to the assets, batteries and heat pumps.  The HAES Project Board have approved the procurement of a suitably qualified and competent company to provide the following services to ensure delivery of project outcomes:   * Access data (to be agreed with Upside Energy) pertaining to asset usage and network frequency * Engage with energy companies to develop a strategy to maximise return when including HAES assets in markets such as Firm Frequency Response and Wholesale Market.      * Test detailed models of the installed energy storage equipment (heat pumps, PV, batteries), individually and as an integrated system within the home and model integrated system performance (power utilisation and state of charge) in a variety of configurations and under different household usage to provide a wide range of results * Explore different approaches to the control of energy storage assets to better understand the potential grid balancing and other electricity network services that could be developed and the likely value of these services * Develop, deliver and test, via Upside Energy, schedules to energy storage assets to increase carbon savings from dynamic demand response and other systems * Produce a report identifying potential commercial energy network service revenue streams * Produce a report of preferred energy storage system and associated energy network commercial service models confirming the potential revenue generated from the energy storage system deployed and recommendations for future deployment * Produce a report identifying preferred approach to maximise carbon savings from energy storage system confirming carbon savings delivered through the project |

| **Consultant knowledge and experience** |
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| **Experience**   * Operating within the highly regulated energy market environment * Engaging with the energy regulator * Dealing with District Network Operators and National Grid * Managing an energy trading desk * Forecasting energy demand and production * Real time monitoring electrical network for:   + frequency   + carbon intensity   + demand   + capacity * Working with local authorities on energy related projects related to the provision of energy or energy network services using publicly owned assets   **Knowledge**   * The energy market and associated network management service requirements at the local and national level * Energy network legislation and regulations * Local authority management structures, decision making processes and financial constraints |

**SUBMISSION GUIDANCE**

All bidders will be required to submit their bids through Email to: [support@procure-plus.com](mailto:support@procure-plus.com).

The bidder is required to respond fully to all questions asked, any tender questions should be directed through the email provided. Responses will be posted to all bidders, therefore, any specific reference to your organisation should be avoided. Pricing must be submitted in excel format to enable evaluations to be undertaken.

All submissions must be materially complete; incomplete or qualified bids will deem your bid non-compliant and will be excluded from further evaluation. Late bids will not be considered and requests to submit after the deadline will be declined. The client reserves the right to exclude from the procurement any bidder that is found to have provided false information or has misrepresented themselves during the procurement process.

The Bidder is expected to pay for all costs associated with their submission. Bidders are solely responsible for ensuring their bid is submitted on time and complete. ***Please note the deadlines will not be extended unless a bidder raises a query that would result in a material change to the Invitation to Tender.***

**Submission Criteria**

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| **Section** | **Requirements & Guidance** |  |
| **1.0** | **Company Information** |  |
| **1.1** | Company name and address | **REQUIRED** |
| **1.2** | The contact details for the persons responsible for this tender |
| **1.3** | Company registration number |
| **1.4** | VAT registration number |
| **2.0** | **Quality Evaluation** | **50% OVERALL** |
|  | Bidders are required to provide a complete answer to all questions asked, avoiding repetition or generic responses. You will be required to answer the following written quality questions as part of your submission. The written submission should be provided at the same time as the priced document. This section of the assessment will contribute 50**%** to your total mark.  Where responses must cover multiple points, Bidders are advised to organise their response into separate paragraphs, one for each point that they are required to cover.  Note there will be a limit set of a maximum 1,000 words per answer. |  |
|  |  | **Weighting** |
| **2.1** | **Experience**  Please explain how your company fulfils the experience requirements outlined in the Consultancy Brief. | **25%**  **Answer attracts a maximum of 10 points** |
| **2.2** | **Knowledge**  Please explain how your company fulfils the knowledge requirements outlined in the Consultancy Brief. | **10%**  **Answer attracts a maximum of 10 points** |
| **2.3** | **Project Delivery**  Please outline how you propose to deliver the requirement of the Consultancy Brief and how you intend to manage the contract, drawing where relevant on your recent experience of undertaking similar jobs.  Provide details of how you will manage your in-house delivery teams (or sub-contractors) to ensure:   1. design and plan work required 2. swift mobilisation of resources for delivery 3. delivery to plan and expenditure within budget targets | **5%**  **Answer attracts a maximum of 10 points** |
| **2.4** | **Skills**  Please outline the organisational structure of your delivery team, detailing key personnel involved in delivery with their CVs or biographies confirming relevant experience. | **5%**  **Answer attracts a maximum of 10 points** |
| **2.5** | **Ensuring quality**  Please outline any specific dependencies to be considered that could impact on the successful delivery of the work.  Bidders will describe how they will manage the contract to ensure quality of delivery. The following issues should be included with responses:   1. communicating with Clients on progress of the contract and Client expectations 2. approach to selection of subcontractors if any. **Sub-contractors should be named along with their subcontracted work package** | **5%**  **Answer attracts a maximum of 10 points** |
| **3.0** | **Price Submission** | **50% OVERALL** |
|  | The price submission requires bidders to:   * Provide quotations for this service provision inclusive of all disbursements, including travel expenses. * Rates should be **exclusive of VAT.** * Submit their pricing in excel format annexed to the main tender document.   Prices are to be fixed for the duration of the contract. | **50%**  **Answer attracts a maximum of 10 points**  **The most economically advantageous bid will receive 10 points, followed by the next 4 bids in 2 points decreasing order.**  **From the 6th most economically advantageous bid, the remaining tenders will receive 0 points.** |

**Evaluation Criteria**

The tender will run over a 10-day period and will assess both quality (50%) and price (50%) against the brief requirements.

Tenders will be evaluated by a scoring team comprised of representatives of Procure Plus and Upside Energy and evaluated in accordance with the weighted percentages as contained within the submission criteria.

Responses to Section 2.0 Quality will be scored out of a maximum of 50 marks, weighted as described above, using a standard method of scoring as set out in the table below: -

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| **Score** | **Comment** | **Scoring Guidance** |
| **0** | Very Poor | The standard of evidence is unacceptable or non-existent, or there is a failure to properly address the question. |
| **2** | Poor | The standard of evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make assumptions. |
| **4** | Concerns | The standard of evidence is broadly acceptable but with noted concerns. |
|  |  |  |
| **8** | Good | Question is addressed in full and contains a good level of detail that fully meets requirements. |
| **10** | Excellent | The standard of evidence demonstrates strengths, no errors, weaknesses or omissions and exceeds requirements in some or all respects. Response adds value and may contain some innovation. |

**Stage 1:**

All submissions will be checked for compliance with tender requirements and calculation errors where possible. Incomplete; qualified bids or those failing to comply with any part of the submission criteria will be excluded at this stage.

The Client also reserves the right to exclude from the procurement any Bidder that is found to have provided false information or has misrepresented themselves during the procurement process.

**Stage 2:**

At stage 2, bids will be evaluated in accordance with the criteria contained herein in order to formulate a total Bidder score.

Procure Plus reserves the right to request clarification from Bidders where necessary to complete the evaluation of the tender. The timeframe for providing a response to a clarification raised, may be short but must be met for the evaluation to be completed on time.

**Stage 3:**

All Bidders will then be notified by letter sent by email of the results of their bid; including their scores and relevant position in relation to the winning bid.

Bidders may request feedback, up to 5-days post notifications being issued.

**Appointment**

Procure Plus reserves the right to appoint service providers on the following basis:

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| **Options** | **Appointment** |
| **1** | The appointment of one Consultant dependant on the most economically advantageous tender. |

Every care has been taken to ensure the accuracy of the information provided at this stage; but no guarantee can be provided as to the volumes of works to be undertaken.

**Withdrawal**

If you wish to withdraw from the competition, please confirm in writing with your feedback on the reason(s) to[support@procure-plus.com](mailto:support@procure-plus.com)

This will help us with future procurements and design of support to potential bidders.

**Procurement Timeline**

The deadline for the submission of tenders is **15:00 on Tuesday 5th November 2019.** Bidders are strongly advised to ensure they organise the completion of their response to enable them to submit their tender by the deadline.

| **Activity** | **Timing** | **Comments** |
| --- | --- | --- |
| Invitation to Tender issued and advertised | **21 October 2019** | Consultancy Brief and Submission Criteria issued and advertised. |
| Receipt of Queries Deadline | **31 October 2019** | Tenderers must have sent clarification questions via email provided. |
| **Tender Documentation Deadline** | **15:00 on 05 November 2019** | Tender responses must be submitted by this date. |
| Tender Scoring | **W/C 18 November 2019** | Carried out by project team. |
| Contract ‘award’ | **TBC** | Bidders will be informed if they have been successful or not. |

***Please note the deadlines will not be extended unless a bidder raises a query that would result in a material change to the Invitation to Participate.***