



**INVITATION TO QUOTE (ITQ):**

Consultancy support for SME Net Zero Support Programme  
Ref: ECCI/RoyalBank/2022/01

**KEY MILESTONES/DEADLINES:**

17 May 2022	Issue of ITQ
<b>6 June 2022, 5pm</b>	<b><u>Deadline for submission of quotes</u></b>
7 – 14 June 2022	Review of quotes*
15 June 2022	Orders placed*
1 July 2022 – 31 December 2023	Contract period

\*Please note the above dates are given as guidelines only and are subject to change

17 May 2022

Dear Supplier

## INVITATION TO QUOTE FOR

### “Consultancy Support for SME Net Zero Support Programme”

You are invited by the University of Edinburgh to quote for the provision of services coordinated by ECCI on behalf of the University of Edinburgh as detailed below. Your quotation must be received by **the time and date specified on the front page of this document**. It is the responsibility of all suppliers to ensure that their quotation response is received no later than the appointed time. The University of Edinburgh may undertake not to consider quotations received after that time.

The University of Edinburgh are not bound to accept the lowest priced or any quote and shall not be bound to accept the supplier as sole supplier. Prices quoted shall remain fixed for the duration of the contract. Value Added Tax (VAT) should be shown separately and the VAT registration number given.

If you cannot supply the exact service the University needs, you may suggest alternatives that meet the specification, whilst complying with any minimum standards and the primary outputs expected from equipment of this nature. Please clearly show the benefits of any such alternatives.

By providing us with a quotation you agree to be bound by the University of Edinburgh’s [Terms and Conditions](#) which will apply to any contract awarded to you after you have provided us with our quotation.

Enquiries and returns regarding this Invitation to Quote should be addressed to Kristin Hopfe ([ClimateSpringboard@ed.ac.uk](mailto:ClimateSpringboard@ed.ac.uk)).

Yours faithfully

**Dr. Alex Hilliam**  
Programme Manager  
On behalf of the University of Edinburgh and ECCI

## ITQ Schedule 1: Statement of Requirements

### Introduction

The Edinburgh Climate Change Institute (ECCI) [www.edinburghcentre.org](http://www.edinburghcentre.org) has a successful track-record in supporting low carbon businesses and providing expertise to accelerate the development of new low carbon products and services.

ECCI are running a Royal Bank of Scotland funded business support programme designed to enable their customer SMEs (up to £25m turnover) to take action towards success in a net zero economy. It will support businesses to both respond to the climate emergency and realise the businesses opportunities provided by the net zero transition.

At the centre of the programme is a series of workshops where like-minded businesses will come together to learn and share experiences and solutions. These are designed to provide SMEs with the knowledge, tools and confidence to take meaningful action, and realise the business opportunities of climate action. Businesses will learn from experts and be given access to a wide range of tools and resources to support and enable action.

To complement this, the programme will offer bespoke additional 1-2-1 support for SMEs who would benefit from some detailed and focused mentoring and advice to enable them to overcome key net zero challenges for their business. This could cover any topic related to sustainability and net zero and encompass a range of challenges, from instigating a small low carbon change in business practice, to a radical shift in business operation or the development of completely new low carbon or sustainable product or service.

ECCI requires suitable consultants to provide this 1-2-1 support a range of Scottish SMEs from across all sectors in taking steps to transition to a net zero, low carbon or sustainable operation. We anticipate that this will include a limited number of 1-2-1 sessions with participants to provide specific advice and suggestions, along with a limited amount of ad hoc advice. At present, we assume that approximately 100-250 SMEs will go through the programme each year, but that not all will require 1-2-1 mentoring. We anticipate that the support will range from a single meeting to 1-2 days of support. The programme is currently being piloted, so we cannot specify the anticipated number of SMEs requiring support.

We are actively seeking, and will appoint, a range of contractors with differing expertise and experience of different sectors and specialist areas. This is a framework contract, and as a result being successful at this stage does not guarantee work. We will match successful contractors to clients based on particular client profile and needs. There will be no additional mini-tendering.

Please note that the programme will also, where relevant and appropriate, refer SMEs to existing free government support available to SMEs in Scotland (e.g. through EST or ZWS).

## KEY AREAS OF EXPERTISE

Consultants are required with expertise and experience in the following areas:

- Knowledge in at least one key area of climate impact reduction, including, but not limited to, the following:
  - Energy efficiency (including buildings, heat, equipment, IT services etc.)
  - Resource use and circular economy
  - Travel, fleet and logistics
  - Procurement
  - Low carbon / sustainable new product development
  - Biodiversity
  - Adaptation
- Supporting low carbon technology and process change, e.g. sustainability-focused product development and systems innovation
- Experience of successfully developing low carbon or sustainability focused businesses
- Market development and networking – using business insights and contacts to facilitate new low carbon market opportunities for companies.
- KPI and milestone support, in particular setting and supporting SME companies to set and achieve business goals and deadlines around their transition to net zero.

The programme is not limited to any particular sector and, as a result, experience in supporting SMEs operating across a wide range of market sectors is sought, including, but not limited to:

- Agriculture
- Healthcare
- Leisure, Hospitality and Tourism
- Real Estate
- Retail and Wholesale
- Charities and Third Sector
- Education
- Manufacturing and Automotive
- Professional Services
- Technology, Media and Telecoms

Please note: We do not expect each consultant to have experience and expertise in all areas described above. It is anticipated that a number of consultants will be appointed to this framework and work will be allocated depending on experience, areas of expertise and preferred approach. Please indicate which types of support or business sectors are most applicable to your expertise and experience.

We are acutely aware that, although many SMEs face similar challenges, each business is unique and may therefore respond differently (in terms of taking actions) to particular types of advice. We are therefore in particular interested in understanding your approach

to supporting and engaging SMEs to enable climate action and what key approaches or insights you would bring to this programme.

ECCI will require interested consultants to provide innovative ways of supporting and training/mentoring SMEs across Scotland, some in remote regions. Limited Travel expenses and materials may be provided (in addition to hourly rates) with prior written agreement from ECCI and a case must be provided as to why the travel costs are necessary. Suppliers may be required to attend 'coaches' meetings to update ECCI on business progress. ECCI will also evaluate the impact of the support offered by successful consultants to explore the impact and identify what has been achieved.

Consultants on this framework **will not be allowed** to deliver private financial contracts or partnerships for any of the businesses supported in any of the current programmes without prior written consent from ECCI. Failure to ask for consent could affect the awarded contract.

## ITQ Schedule 2: Specifications

### Information to be provided in the tender response:

- Name of Contact for this Tender
- Position
- Company Name
- Address
- Telephone number
- E-mail
- Website address (if applicable)
- Address of Registered Office (if applicable)
- Company Registration Number (if applicable)
- VAT registration number (or: alternative EU registration number)
- A copy of Public liability, professional indemnity and/or employer's liability insurance certificates as appropriate.
- Completed Form of Tender (Schedule 3)
- Completed Pricing Schedule (Schedule 4)
- Confirmation that no conflict of interest would arise if you were successful in being awarded the Contract

Any tender that does not accord with all the requirements herein and in the covering letter may not be considered.

### Key points for tender response completion

- The tender and all requested enclosures must be submitted in the English language
- The tender response should be NO MORE than 5 pages long. The tender response MUST include content under the following headings
  - Experience supporting businesses to transition to low carbon operation
  - Areas of specialist support in climate impact reduction
  - Sector expertise and experience
  - Added value
  - Approach to mentoring and supporting SMEs to reduce their climate impact
  - Details on individuals involved in the delivery and associated hourly rates ex VAT
- The tender must include a risk matrix.

### Fees and Costs

- All Charges must be shown in Pounds Sterling and entered exclusive of VAT. The Contractor(s) will be paid in Pounds Sterling
- The response to the Pricing Schedule (Schedule 4) will be used to commercially evaluate the cost element of your response.

**Tender Evaluation Criteria:**

The quotation will be evaluated using the following criteria and weightings:

- Cost 20%
- Mentoring approach 30%
- Demonstration of previous relevant experience and added value 50%

**Variations to the Contract**

Any variations required must follow the Change Control Procedures detailed in the Terms and Conditions.

## ITQ Schedule 3: Form of Tender

\*I/We the undersigned do hereby contract and agree on the acceptance of the tender by The University of Edinburgh, to provide the Statement of Requirements in accordance with the Schedules, and, where ordered by the Contract, delivery of the Contract and at the Charges entered in the Pricing Schedule and in accordance with the Terms & Conditions which appear in this set of documents.

\*I/We the undersigned undertake that we have submitted a tender in accordance with the following documents:

This Invitation to Tender Letter;

Schedule 1	Statement of Requirements
Schedule 2	Specifications
Schedule 3	Form of Tender
Schedule 4	Pricing Schedule

\*I/We agree to abide by this tender from **5PM on 6 June 2022**, the date fixed for receiving tenders, until the award of the Contract.

\*I/We understand that The University of Edinburgh is not bound to accept the lowest or any tender and shall not be bound to use the Contractor as a sole supplier.

\*I/We understand that the Contract will be awarded in June 2022 unless The University of Edinburgh or the Contract is terminated in accordance with the provision of the Terms and Conditions.

Signature and date:	
Name (Block Capitals):	
Designation:	

Duly authorised to sign Tenders for and on behalf of:

Name of Tenderer	
Nature of Firm/Individual(s) <sup>1</sup>	
Key Contact Address:	
Telephone number:	
E-mail	

<sup>1</sup> It must be clearly shown whether the Tenderer is a limited liability company, statutory corporation, partnership, or single individual trading under his own name.



## ITQ Schedule 4: Pricing Schedule

Staff / Consultant name and role	Hourly Rate
<b>Other Costs</b>	

<b>Completed by:</b>	<b>Position in Company:</b>
<b>Signature:</b>	<b>Date:</b>

***Please provide additional price detail within attached documents if necessary and make a clear note of what these documents are called when making your submission.***

### 1. Tenderers must note that:

- 1.1 All costs should be inserted into the relevant column of the pricing schedule above.
- 1.2 In cases where contractors are offering multiple staff members with different hourly rates for the work, bidders should list hourly rates for each staff member, and then offer an 'average' hourly rate to be used for the purposes of assessment. This 'average' hourly rate should be calculated to take into account the anticipated allocation of staff at different grades to this work. For example:
  - STAFF 1: £40 per hr; expected allocation: 50%
  - STAFF 2: £50 per hr; expected allocation: 30%
  - STAFF 3: £60 per hr; expected allocation: 20%
 'Average' hourly rate:  $[(40 \cdot .5) + (50 \cdot .3) + (60 \cdot .2)] = £47$  per hour
- 1.3 All Charges must be shown exclusive of VAT but be inclusive of materials, overheads and profit

### 2 Invoicing & Payment

- 2.1 The Contractor will be required to submit invoices (including timesheets) on a monthly basis at the end of the calendar month. Work must be to the satisfaction of ECCI and the University of Edinburgh in accordance with the Terms & Conditions. Value Added Tax, where applicable, shall be shown separately on all invoices as a strictly net extra charge.
- 2.2 Payment will be made to the Contractor within 30 days of receipt of a valid invoice. Subject to University of Edinburgh processes.