



THE UNIVERSITY *of* EDINBURGH

INVITATION TO TENDER (ITT) FOR:

Consultancy support for Low Carbon
Innovation and business development

CONTRACT PERIOD:

Monday 4th February 2019 – 31st December 2019

The University of Edinburgh REFERENCE:

ECCI/CK/01

Tenders must arrive no later than

5pm Friday 14th December 2018.

5th September 2018

Dear Supplier

INVITATION TO TENDER FOR:

**Consultancy Support for Low Carbon
Innovation and Business Development**

- 1 You are invited by The University of Edinburgh to tender for this work coordinated by ECCI on behalf of the University of Edinburgh, in terms of, and in accordance with, the Invitation to Tender of which this Invitation to Tender Letter forms part.
- 2 The Contract will be for a period of approximately 11 months
- 3 The work forms part of a European funded Climate Change mitigation project.
- 4 Your Tender must be submitted in accordance with this Invitation to Tender Letter, and in accordance with the following attached documents, all of which shall be deemed to form and to be read and to be construed as part of this Invitation to Tender
 - 4.1 This Invitation to Tender Letter;Schedule 1 - Instructions & Information for Tenderers;
Schedule 2 – Statement of Requirements
Schedule 3 – Contract Monitoring & Management Schedule;
Schedule 4 – Information to be provided in the Tender Response;
Schedule 5 – Form of Tender;
Schedule 6 – Pricing Schedule;
- 5 Tenders must arrive not later than 5pm on Friday 14th December 2018.
- 6 Tenders will be issued and should be returned directly to ECCI in electronic form to Laura Scotland (laura.scotland@ed.ac.uk) ECCI by the agreed time and date.
- 7 It is the responsibility of all tenderers to ensure that their tender is submitted not later than the appointed time.
- 8 Tenders received after that time may not be considered.
- 9 The University of Edinburgh is not bound to accept the lowest or any tender.

10 Enquiries regarding this Invitation to Tender should be addressed to the undersigned at the above address.

Yours sincerely,

Charlotte Waugh
Head of Innovation and Enterprise, ECCI
On behalf of the University of Edinburgh and ECCI

Instructions & Information for Tenderers

1. Tenderer Information Collection

- 1.1. It is the responsibility of the tenderer to obtain for themselves at their own expense any information necessary for the preparation of their tender and for any costs incurred during the tendering process.

2. Confidentiality

- 2.1. All information supplied by The University of Edinburgh in connection with the Invitation to tender shall be treated as confidential by tenderers except that such information may be disclosed for the purpose of obtaining sureties and quotations necessary for the preparation and submission of the tender, this includes consortia members, sub-contractors and advisors.

**3. Information Disclosure and the Freedom of Information Act 2002
Environmental Information (Scotland) Regulations 2004**

- 3.1. All information submitted to The University of Edinburgh may need to be disclosed and/or published by The University of Edinburgh. The University of Edinburgh may disclose information in compliance with the Freedom of Information (Scotland) Act 2002 and the Environmental Information (Scotland) Regulations 2004, (the decisions of The University of Edinburgh in the interpretation thereof shall be final and conclusive in any dispute, difference or question arising in respect of disclosure under its terms), any other law, or, as a consequence of judicial order, or order by any court or tribunal with the authority to order disclosure.
- 3.2. Further, The University of Edinburgh may also disclose all information submitted to them to the Scottish or United Kingdom Parliament or any other department, office or agency of Her Majesty's Government in Scotland or the United Kingdom, and their servants or agents. When disclosing such information to either the Scottish Parliament or the United Kingdom Parliament or their executive bodies, it is recognised and agreed by both parties that The University of Edinburgh shall, if they see fit, disclose such information and are unable to impose any restriction upon the information that they provide to Members of the Scottish Parliament, or Members of the United Kingdom Parliament.
- 3.3. It should be noted though, that, even where you have indicated that information is commercially sensitive, The University of Edinburgh may disclose this information where they see fit. Receipt by The University of Edinburgh of any material marked 'confidential' or equivalent should not be taken to mean that the University of Edinburgh accept any duty of confidence by virtue of that marking. The University of Edinburgh may be required to provide supplier information submitted as part of the tender, to the project funders, EIT.

4. Modifications to the Invitation To Tender by The University of Edinburgh

- 4.1. Any modification to the Invitation to Tender by The University of Edinburgh will be notified to tenderers no less than 5 working days prior to the tender return date. If appropriate, The University of Edinburgh will revise the tender return date to all tenderers to accommodate this.

5. Accuracy of Tender Response

- 5.1. Tenderers will be deemed to have examined all the documents enclosed with this Invitation to tender and will be held to have fully informed themselves as to the nature and extent of the requirements detailed in the Invitation to Tender. Tenderers must check the accuracy of their tender submission prior to return, paying particular attention to clerical errors and omissions. The University of Edinburgh may, at its discretion, seek clarification regarding any concerns over accuracy of tendered responses. Tenderers will not be permitted to amend tenders after the tender return date except as part of any tender clarification process. The University of Edinburgh reserve the right to disqualify incomplete tenders.

6. Tendering Timetable – Key Dates

- 6.1. Tenderers will be notified in writing by email whether any further actions will be required. .

The Following is the indicative project plan for the procurement –

Closing date for Tender Response	14 th December 2018
Award (estimate)	End of January 2019
Contract Commencement (estimate)	4 th February 2019
Contract Closure	31 st December 2019

7. Tender Evaluation Criteria

Award Criteria, weightings and scoring

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

Evaluation Criteria	Weighting
Value for money	20%
Methodology and approach proposed	20%
Demonstration of previous relevant experience and added value	40%
Outcomes and reporting approach	20%

8. Tenderer Details

8.1. Please insert the following background information:

Name of Contact for this Tender Position Company Name Address			
Tel No		Fax No:	
E-mail			
Website address (if applicable)			
Address of Registered Office (if applicable)			
Nature of Organisation (e.g. PLC, Partnership etc)			
Company Registration Number (or alternative EU registration number)			
VAT Registration Number (or alternative EU registration number).			

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

STATEMENT OF REQUIREMENTS

Consultancy support for low carbon innovation and business development

Introduction

The Edinburgh Centre for Carbon Innovation (ECCI) 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 will be building on the second year of Climate-KIC delivery and will be delivering number of existing and new start up and business development support services for Scotland funded by Climate-KIC (EIT funded), the largest entrepreneur network in Europe. www.climate-kic.org

ECCI is a partner of Climate-KIC and will be providing the sourcing, selection of participants and the support mechanisms for delivering a number of competitions and accelerator programmes (mentoring and workshops) as well as ClimateLaunchpad. ECCI require consultants with experience of working with early stage and developing businesses, entrepreneurs and climate change stakeholders in a number of key markets to support and widen ECCI's current low carbon innovation work through providing suitable support to start ups, developing and commercial stage companies. These services will be based on the following directives:

- Innovative start-up businesses are a key ingredient of dynamic innovation clusters.
- ECCI wants to ensure a lively start-up community in both Scotland and Edinburgh's city-region cluster, with a focus on innovation for tackling climate change.
- Our accelerator model has proven results, and involves a hands-on support model with a series of stages and reviews to ensure new climate-positive businesses are well equipped for growth. This includes training and workshops as well as industry advice and contacts.
- Sustainable business Training & Skills are essential to successful low carbon start-ups.
- The model offers an opportunity for other parties to invest – both locally and nationally – to grow the number of businesses receiving accelerator support and increasing the chances of forging a new climate economy.
- We need to learn from our international partners and Climate-KIC offers many opportunities through both existing and new networks.

ECCI requires suitable consultants to support a range of new and existing low carbon entrepreneurs and enterprises involved in the key programmes. **Please select the programmes you are applying for and provide evidence of relevant experience within your application.**

ENTREPRENEURSHIP PROGRAMMES

1. **Accelerator** covering business model development, and planning, product testing/feasibility through to investment, market testing, exporting **and commercial viability**.
<http://www.climate-kic.org/for-entrepreneurs/accelerator/>
2. **ClimateLaunchpad** – an annual nationwide competition requiring SME training in business planning, pitching skills, market research and investment/commercialisation. <http://climatelaunchpad.org/>

EDUCATION PROGRAMMES

1. **The Greenhouse Programme** (incubating new early stage ideas):
<http://www.climate-kic.org/for-students/pre-incubation/>
2. **The Journey** This is the world's largest climate innovation summer school, organised by EIT Climate-KIC and partners. Students and professionals from all over the world come together for an intensive innovation and entrepreneurship programme hosted by top European universities.

CLIMATE-KIC PROJECTS

1. **Project delivery and management (including bid writing) within Climate-KIC thematic areas – this includes urban sustainability, sustainable land use, sustainable production systems and decision metrics and finance as well as local themes: data driven innovation and rural and water based innovations.**

KEY AREAS OF EXPERTISE

Key areas of expertise are required in 2019 in the following areas:

- Proven Business Model development and validation.
- Experience of successfully developing a new business/or businesses.
- Product Testing, Funding and Investment – Advising, sourcing, preparing and linking suitable **entrepreneurs with investment, grants and expertise**.
- Training and Leadership – providing skills training, market awareness and knowledge exchange to support **business development**. Topic include: sales & marketing, investment, teams & people, market review, financial planning, etc.
- Low Carbon Focussed Innovation International best practice and knowledge brokering.
- KPI and milestone support, investigation, collation and report writing.

Background

Introducing Climate-KIC (Climate Knowledge and Innovation Community) operating since 2010, Climate-KIC is Europe's largest public-private partnership focused on innovation for tackling climate change. The mission is to bring together, inspire and empower a dynamic innovation community to build a net-

zero carbon economy and climate resilient society. By 2021 Climate-KIC aim to be:

- A global leader in climate and sustainable innovation, recognised for delivering impact
- The trusted partner for all climate innovation actors, supply-side, demand-side and enablers
- Provide centres of excellence with the very best people to inspire and support climate leaders and innovators
- Provide a compelling choice for funders looking to support climate innovation.

Climate-KIC works across Europe through a series of geographical units, each delivering interconnected innovation programming that includes education and training, start-up business support and larger scale demonstration trials. The UK and Ireland is one such unit and is responsible for fostering a dynamic climate innovation ecosystem to **create jobs, reduce emissions and strengthen resilience**. In the UK and Ireland our approach is to:

- Accelerate the evolution of climate innovation clusters based on local competitive advantages
- Support game changing innovation ideas and projects aligned to Climate-KIC's thematic focus (**Urban Transitions, Land-use, Sustainable Production Systems and Decision Metrics and Finance**) and in a way that maximises the added value of Climate-KIC's pan-European innovation network.
- Demonstrate leadership in the role as a climate innovation catalyst.

Approach

Evidence shows that radical and fast-paced innovation is most likely achieved through dense, geographically-concentrated clusters of companies, start-ups, researchers and financiers, backed by supportive public bodies and policies. Such innovation clusters can become engines of local economic growth and have profound impacts nationally, regionally and globally.

In Scotland ECCI will:

- Identify innovation clusters with relevance to climate change that already exist, create new ones as required and work with strong political leaders and strategic partners to add a focus on climate-positive innovation.
- Seek to involve a wide-variety of different actors in a cluster ecosystem, recalling that innovation can come from many different quarters and involves changing approaches and behaviours as well as technology.
- Recognise that successful innovation clusters tend to have a mix of ingredients, and while some of those ingredients can be strengthened in the short-to-medium term, others will take much longer (e.g. low quality of life, poor infrastructure). Some missing ingredients could be major obstacles to rapid cluster development, whereas others like connections between actors, start-up finance and tailored skills development can be more readily strengthened.

Focus

Based on research about the current status of clusters around the UK, the existing connections of Climate-KIC and our desire to generate greater programming coverage across the UK, focus is on four cities during the period 2018-2019: London, Birmingham, **Edinburgh** and Dublin. ECCE is the delivery vehicle for Edinburgh & Scotland.

Climate-KIC has four key thematic areas which ECCE anticipates supporting businesses in through this contract: <http://www.climate-kic.org/themes>

1. Urban Transitions

Climate change and the demands of booming urban populations pose a major challenge for infrastructure, buildings, energy supply, water systems and drainage, sanitation, waste management, housing and mobility. Cities need to be able to deal with climate risks and impacts (flooding, temperature rise, urban heat islands) and move to more sustainable, zero-carbon and resilient 'circular' pathways. The onus is on cities to improve air quality, reduce emissions, waste and resource use, and at the same time promote wellbeing, public health and social balance resulting in 'restorative' cities. Meeting these ambitions will demand trillions of investment, and innovation in systemic thinking, governance and financing. This is a major opportunity for a new, sustainable market to emerge harnessing the creativity, skills and economies of scale that exist within urban environments to produce new systemic solutions. Climate-KIC's Urban Transitions catalyses urban transformation through collaboration and systemic innovation across infrastructure, governance and investment (in collaboration with Climate-KICs Decision Metrics and Finance theme).

2. Sustainable Production Systems

The dominant take-make-dispose model of production and consumption represents a high level of inefficiency in resource use. In the face of climate change and increasing vulnerability in supply chains, there is a need to design out emissions and waste, optimize and share resources, develop synergies between industrial systems and build resilience. Climate-KIC's Sustainable Production Systems theme is building a new foundation for industry in Europe, fostering innovation that decouples economic growth from unsustainable resource use and greenhouse gas emissions. We develop and champion climate-friendly and economically viable circular models of manufacturing that will deliver a carbon-neutral European economy

3. Sustainable Land Use

The extensive demands on natural resources, and the interactions between land use and ecosystems services make the agriculture, food and natural resources sector complex in terms of sustainability. With the impact of climate change, there is a need to build resilience into food and forest supply chains, and, at the same time, drive transparency and traceability. There is a need for a coordinated approach that addresses externalities and efficiency across the value chain. Climate-KIC's Sustainable Land Use theme supports approaches that decarbonize agriculture, making it more efficient and productive. We foster innovation in the bio-economy that builds resilience into global food and forest value chains. We promote integrated, sustainable land use, coalescing

4. Decision Metrics and Finance

The Paris Agreement has united the globe in its fight against global climate change and has set ambitious targets. While it is clear that many solutions already exist, there still remains a big challenge: scaling up the innovative solutions quickly enough to a level consistent with the targets set. The fact that even current targets are not sufficient to stay on track is exemplified by the fact that countries will examine in 2019 whether and how to tighten targets. With respect to mobilizing the required finance, in infrastructure alone for example roughly \$93 trillion of infrastructure designed to be low-emission and climate-resilient will need to be built globally in the next 15 years.

5. Key areas of delivery for The University of Edinburgh, Climate-KIC and the Scottish Government

Within the UK & Ireland 'node' of Climate-KIC, ECCI and Edinburgh have been asked to identify and support ideas, individuals and enterprises with a particular focus on opportunities from within the following areas of added value;

- a) Data Driven Innovation**
- b) Rural and Water based innovations**

Hard Project Outcomes

This project has some key indicators and targets:

Number	Indicator	Ideas/Businesses Supported
1	Number of enterprises supported Across the 4 thematic areas for Greenhouse & Accelerator	22 minimum
	ClimateLaunchpad competition	12 minimum
2	Number of Climate-KIC business support programmes to be delivered	5

It is anticipated that a number of consultants are appointed to this framework depending on experience and areas of expertise. Please indicate which service and/or thematic areas are most applicable to your application.

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.

Monthly Reporting and KPIs

Reporting and collection of KPI's are an important part of the framework tasks for ECCI and Climate-KIC. We **will** require efficient and organised paperwork submitted to set deadlines along with regular reporting as requested by ECCI. Reporting is required on a monthly basis and at the end of all entrepreneur, education programmes as well as any Climate-KIC standalone projects.

ECCI will require interested consultants to provide innovative ways of supporting and training/mentoring businesses and entrepreneurs across Scotland, some in remote regions. It is not expected that all supported organisations will be based in Edinburgh. Limited Travel expenses and materials may be provided (in addition to day rates) with prior written agreement from ECCI and a case must be provided as to why the travel costs are necessary. Suppliers will be required to attend monthly 'coaches' meetings to update ECCI on the businesses progress – all dates will be set in advance.

Soft Project Outcomes

ECCI would like to evaluate the softer outcomes of project and the services provided and what has been achieved. We would like the successful consultant/s to provide a view of the outcomes we may wish to consider and how they could be measured e.g. carbon emissions, economic impact.

It is envisaged that significant stakeholder engagement will be required with the SMEs, Networks, support agencies and low carbon stakeholders including finance/investment. ECCI is very interested to adopt the most appropriate approach to this to gather and record the maximum amount of information on appropriate contacts and market information to support the project.

Deadline

Tenders should be returned via email Laura Scotland at laura.scotland@ed.ac.uk by 14th December 2018.

Tenders should use standard word processing, spreadsheet and power point software to;

- a) Illustrate the knowledge, experience and capability of the tendering organisation and/or individuals in relation to the achievement of the outcomes sought and illustrated above.
- b) In **no more** than 5 PAGES illustrate the approach proposed to achieve the key areas of expertise required (pg. 8), outline the programmes applying for (pg. 7 and 8) detailing the outcomes sought and illustrated above and the challenges and potential opportunities presented through your approach.

Fees and Costs

The contract value available is based on an hourly rate of £55. This is exclusive of VAT and the University would welcome quotations for less than this maximum amount. It is anticipated that multiple contractors will be awarded and each successful candidate would receive between 10 to 20 days (equivalent) per year across the five Climate-KIC service areas. (However this an estimate and there may be more or less days available).

Quotations should include appropriate number of days and the daily/hourly rates of all named individuals and roles to be completed within the contract as well as other appropriate costs to be incorporated into the total contract value. Please provide quotes based on a 7 hour working day.

There will be no guarantee of work/hours.

Management of the Contract

- ECCI will nominate an appropriate person (the Account Manager) who will be the point of contact for all matters relating to the Contract
- The Account Manager shall have the authority to allocate sufficient resources as required to meet the summary of requirements
- The Contractor will be required to adhere to the requirements noted in schedule 2 and schedule 4.

Variations to the Contract

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

Corporate Social Responsibility (CSR) Issues

ECCI and the University of Edinburgh will take account of economic, social and environmental impacts in the way the organisation operates – maximising the benefits and minimising the downsides.

ECCI and the University of Edinburgh will strive in all of their dealings to:

- a) achieve high quality in our work and to have high expectations of our staff, directors and others;
- b) be innovative and imaginative;
- c) be open and transparent in our operations and communicate well;
- d) adopt a partnership approach;
- e) value the contribution of our staff and the staff of colleges, universities and other stakeholders and be a good employer;
- f) act with integrity at all times and be fair and even-handed in our dealings with colleges, universities, suppliers, and other stakeholders;
- g) respect and promote equality of opportunity and diversity;
- h) encourage sustainability and sustainable development;
- i) use the resources made available to us efficiently and effectively and always act in the public interest; and act with courtesy at all times.

The Contractor shall at all times act in an ethical, environmental, and socially responsible manner in the conduct of their business.

CONTRACT MONITORING & MANAGEMENT SCHEDULE

1 Strategic Contract Management

ECCI is responsible for the management of this project.

2 Key Performance Indicators

2.1 Key Performance Indicators (KPI's) for the Contract will be around the following and will be agreed and monitored with the successful supplier:

- Delivery of Outputs within the timescales as noted in Schedule 2.
- Queries are dealt with in timely manner.

3 Roles & Responsibilities

3.1 A summary of the key roles and responsibilities of the various parties, activities required to be undertaken, and commodity specific performance and reporting measures are detailed below.

4 Meetings & Submission of Performance Reports

4.1 Meetings

4.1.1 The Contractor will be expected to attend monthly meeting with Business supported through the programmes.

4.1.2 The Contractor will be expected to attend coaches meetings, also some key meetings (paid for) with ECCI at no additional cost. A key requirement is to provide suitable reports on a monthly basis to ECCI Innovation staff. This needs to be done in a timely and professional manner in accordance to set timescales and when appropriate and required and to provide monthly reports on innovator's progress and development.

INFORMATION TO BE PROVIDED IN THE TENDER RESPONSE

KEY POINTS FOR TENDER RESPONSE COMPLETION:

- 1 The tender and all requested enclosures must be submitted in the English language
- 2 The Tender response to Schedule 2 should be NO MORE than 5 Pages long. The Tender response MUST specify which programmes the consultant can deliver and provide evidence for this. The Tender must also include a risk matrix.
- 3 All Charges entered in the Pricing Schedule must be shown in Pounds Sterling and entered exclusive of VAT. The Contractor(s) will be paid in Pounds Sterling.

IN ADDITION, TENDERERS MUST NOTE THAT:

1 tenderers must submit the following documents in their tender:

- 1.1 Public liability, professional indemnity and employer's liability insurance certificates as appropriate.
 - 1.2 Completed Form of Tender (Schedule 5)
 - 1.3 Completed Pricing Schedule (Schedule 6)
2. The response to the Pricing Schedule (Schedule 6) will be used to commercially evaluate the cost element of your response.
 3. Confirm that no conflict of interest would arise if you were successful in being awarded the Contract.

4. Insurances Pass/Fail

- 4.1 Provide one copy of your insurance certification demonstrating as appropriate:
 - 4.1.1 Public liability insurance
 - 4.1.2 Employers liability insurance
 - 4.1.3 Professional indemnity insurance

FORM OF TENDER
(* DELETE AS APPROPRIATE)

*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 - Instructions & Information for Tenderers;

Schedule 2 – Statement of Requirements;

Schedule 3 – Contract Monitoring & Management Schedule;

Schedule 4 – Information to be provided in the Tender Response;

Schedule 5 – Form of Tender;

Schedule 6 – Pricing Schedule;

*I/We agree to abide by this tender from **5PM on 14th December 2018**, 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 late January 2018 unless The University of Edinburgh or the Contract is terminated in accordance with the provision of the Terms and Conditions.

Signature:		
Name:		(BLOCK CAPITALS)
Designation:		

Duly authorised to sign Tenders for and on behalf of:

Name of Tenderer	
Nature of Firm / Individual(s)	
Key Contact Address	

Telephone No		
E-mail		
Date		

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

PRICING SCHEDULE

It is the preferred option of ECCI / University of Edinburgh that a fixed cost for the completion of this work for the duration of the agreement.

The total maximum cost of the tendered price is no more than £50 ph. rate exclusive of VAT. Please provide quotes based on a 7 hour working day.

ECCI/Climate-KIC Programme			
Staff / Consultant name and role	Daily Rate	No of days	Total
Other Costs			
Total Net Cost			
VAT (if appropriate)			
Total Submitted Cost			

Completed by:	Position in Company:
Signature:	Date:

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.

Tenderers must note that:

- 1.1 All costs should be inserted into the relevant column of the pricing schedule above.
- 1.2 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 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.