



Low Carbon Lake District

Invitation to Tender for

The **Summative Assessment** of the ERDF funded Low Carbon Lake District programme:

1. Project name – Keswick to Threlkeld Multi User Trail
2. Project name – Brockhole Energy Projects and Solar PV with EV Charging
3. Project name – Autonomous Electric Vehicles

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1. Introduction

Lake District National Park

The Lake District National Park Authority is the public body responsible for statutory and strategic aspects of the Lake District National Park. Statutory responsibilities include planning, the Partnership Plan (Management Plan) and Rights of way, access and bylaws. The Authority's Strategic priorities are: Covid recovery, Net Zero Carbon, Nature Recovery, The Future of Farming, Landscape Culture and Beauty, Smarter Travel, Affordable Housing and Lake District for Everyone.

The **Net Zero Carbon** priority is outlined as follows:

We will have largely implemented the necessary offsetting measures through externally funded projects on land under our control to achieve net zero carbon for our organisation in 2025. We will be leading net zero carbon in the National Park by 2037 through the Lake District National Park Partnership to resource the measurement, monitoring and communication of progress.

Low Carbon Lake District

The Lake District National Park Authority has secured £4,261,683 funding from the UK European Structural and Investment Fund to deliver a £7,314,990 programme of projects called Low Carbon Lake District (LCLD). LCLD consists of three projects:

1. Keswick to Threlkeld Multi User Trail
2. Brockhole Energy Projects including Solar PV and EV Charging; and
3. Autonomous Electric Vehicle Demonstration Project (AEV)

Low Carbon Lake District is funded under Priority Axis 4: Supporting the shift towards a Low Carbon Economy in all Sectors. It focuses on reducing business CO₂e emissions, whilst also aiming to stimulate market growth of the local environmental technology sector and showcasing low carbon transport alternatives.

Delivery of a Low Carbon Lake District programme by the Lake District National Park Authority has been underway for several years now, commencing in July 2019.

Between July 2019 and June 2021 the three projects have been delivered, with some aspects of works ongoing at Brockhole, due to Covid-19 limitations in 2020.

The key output of the programme was to deliver annual CO₂ savings of 211 tonnes, c43 tonnes from energy savings and investment in low carbon at Brockhole and 168 tonnes per annum

from vehicle trips avoided with pedestrian and cycle use of the new route between Keswick and Threlkeld.

2. Programme Aims and Funding

The ERDF required outputs make up the aims of the LCW programme, these are:

- C34 - Tonnes of CO₂e saved.

The targets affixed to these aims vary within each LEP area, as in the table below:

Project	LEP Area	C34 (tonnes CO ₂ e)
K2T	Cumbria	168
Brockhole	Cumbria	43

To achieve these aims the European Regional Development Fund has committed funds in the following way:

Contract	LEP Area	Total Budget (£)	Total ERDF Funding (£)*
Programme Management	Cumbria	£141,574	£84,944
K2T	Cumbria	£8,281,631	£3,691,034
Brockhole	Cumbria	£442,738	£340,128
PODS	Cumbria	£161,751	£145,576

*Potential to change subject to PCR, intervention rates were applied evenly

3. Delivery

The programme involves three main elements:

Keswick to Threlkeld multi-user trail

Development of the c.5km Keswick to Threlkeld multi-user trail will provide a low carbon alternative to traditional car transportation. The cycle path will link to a business park at Threlkeld and a potential new employment in Keswick. This will encourage people to utilise public transport/leave their cars and take the trail to either Keswick or Threlkeld, reducing

road journeys and reducing GHG by an estimated 160t CO₂e per year saving (this would increase based on use).

Specifically, the main works required to create the route would include:

- Excavation and reuse of the tunnel under the A66 including regrading of the path;
- A new bridge installed at the site of the former Low Pearson's Bridge;
- New embankments and abutments formed;
- Reconstruction of the washed-out Railway Path between Brundholme and Low Pearson's Bridge;
- A new bridge installed at the site of the former Brundholme Bridge;
- New embankments and abutments formed;
- Repairs to Rawesome Bridge;
- New ramping onto/from the A66 footway; and
- Improved surfacing for the entire length.

Renewable Energy and Energy Efficiencies at Brockhole

Description

In furtherance of the Strategic Priorities of the Lake District National Park Authority, this project aims to invest in sustainable energy systems at Brockhole, the Lake District National Park Visitor Centre located at Brockhole on Windermere, Cumbria, LA23 1LJ. The visitor centre hosts a wide variety of events and attractions and includes a 'TreeTop Trek', café and gardens as well as access to Lake Windermere. Primary aims are to deliver a significant reduction in site carbon emissions, underpin wider national Park sustainability goals and carbon budget and to provide an exemplar that can be showcased to other organisations of what can be achieved, even in sensitive sites. Innovation, new technology, careful and responsible application of these in a sensitive site and full alignment with the wider Lake District National Park Partnership Plans and Vision for the Park will be cornerstones of the project.

Key elements included within the projects that will be delivered are:

- Introduction of a new Ground Source Heat Pump (latterly changed to a Lake Source Heat Pump) solution, to replace existing gas boilers, based in the meadow area within the listed gardens. Implementation will also address the significant flooding/drainage issues prevalent with that part of the site for wider environmental and visitor benefit.

- Improvements to the heating output systems and insulation within the White House (the main building on site) in order to maximise the benefits from the new ground source system, thereby optimising energy efficiency and enhancing the visitor experience.
- Introduction of a new solar PV car park system, incorporating 10 public electric vehicle charging points, that we can pilot and showcase with a view to expansion to other car parks within the National Park. This will also enable future application of battery storage as that technology continues to advance to future-proof the application. The system will be connected to the Brockhole electricity system and displace grid electricity if charging points not in use. Charging points will draw on the Brockhole supply when solar power provision is exceeded. Usage will be continuously monitored to understand the carbon benefit, both from grid energy displaced and electric vehicle use.
- 2 charging locations for the PODs
- Provision of a base and services for the driverless pods pilot and showcase within the National Park.
- Implementation of an interpretation and communications programme that showcases sustainability, new technology and innovation to a wide range of audiences. These would include other businesses and organisations, visitors to the National Park, school children through our extensive school's education programme as well as other National Parks within the UK and beyond. Note, this work is not funded by ERDF. Monitoring of these outputs will form part of the ongoing project and will be reported in the Summative Assessment.

In terms of key deliverables, the project will deliver (visitor aspirations impacted by Covid-19):

- Carbon gas emissions reductions of 43tonnes equating to 10% of overall Authority emissions and c20% of Brockhole. Carbon savings for each element are assessed as:
 - Ground Source (changed to Lake Source)Heat Pump c20 tonnes annually
 - Solar car park c23 tonnes annually
- A wide audience engaged on sustainability and renewable technology, Brockhole typically gets the following:
 - Visitors – c.300k directly engaged annually
 - Children – c.15k directly engaged annually through school programme
 - Businesses – c.50 businesses annually engaged through events and seminars

Autonomous Electric Driverless Pod

Description

This project builds on a previous project to test the PODs concept over a weekend in controlled scenarios, see the LAVIS report attached to this application.

This project will run two 6-month* trials of driverless 'PODs' during the summer seasons in 2019 and 2020 that will link the house and car park to the boat landing at the Lake District National Park's visitor centre, Brockhole. The pods are fully autonomous and operate using LiDAR, RADAR and GPS. They run on rechargeable graphene batteries, are fully accessible and can carry up to four passengers. Brockhole receives c300,000 visitors per annum and is an ideal location to showcase this exciting new way to travel.

The original intention (as outlined in the application) was that the PODs will be stored and charged using the Solar Canopy outlined above once constructed with interim arrangements for c2months. Due to a number of factors (including grid connection timescales to operate the charging infrastructure and the impacts of Covid on the operation of the PODs) the PODs were not charged from the Solar Canopy.

*was updated to be a single 12 month phase, which was subsequently impacted by Covid-19.

4. Requirements and specification for evaluation

The Lake District National Park Authority wish to appoint a third party to conduct evaluations of the projects delivered in the UK ESIF Funded Low Carbon Lake District programme. This tender will be for a single evaluation report.

The requirement for the evaluation is primarily to meet the UK ESIF Summative Assessment report requirements, which have the overarching aims of identifying; the successes, failures and outcomes of the project, key lessons learnt, and recommendations for future improvements in the delivery of projects by the Authority.

Elements of both qualitative and quantitative research with stakeholders and data supplied by the Authority will be used in the construction of the evaluation. The bidder successful in receiving the contract will undertake the evaluation over two stages:

The evaluations will involve quantitative and qualitative assessments of the programme and tenderers must demonstrate a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection and analysis, reporting complex information to both technical and non-technical stakeholders and assessing the

reliability and validity of studies. Previous experience in several subject themes will also be of high importance:

- Environmental and/or carbon emissions reporting.
- Publicly funded programmes.

The evaluation must comply with the requirements for summative assessments as detailed in the European Regional Development Fund 2014 to 2020 summative assessment guidance and appendices (August 2019 and as updated). The evaluation will be supported by the appointed consultant until the summative assessment is agreed by MHCLG.

Confirmation of benchmarking methodologies will need to take place for the individual programmes at the outset of the evaluations.

Data sources for the evaluations will be;

- Benefits assessment undertaken to support Highway England match funding to the Keswick to Threlkeld Trail
- Initial survey information with businesses in Keswick and Threlkeld
- Follow up business survey information Keswick to Threlkeld (available August 2021)
- User intercept surveys K2T (available August 2021)
- Usage information from trail counters upon completion
- CBEN Report on the investments (specification and performance) at Brockhole
- User feedback survey from POD trial
- Stakeholder engagement with:
 - Westfield Technology (provider of the PODs)
 - Brockhole and LDNPA Staff

Details of how data will be collected and in what form it will be available will be discussed with the successful bidder (questions regarding this may be sent to hanna.latty@lakedistrict.gov.uk prior to submission of an application).

The evaluations will include a minimum of the following elements (bidders are expected to suggest additional work that they may undertake when producing the evaluation, and the Lake District National Park Authority reserves the right to make reasonable alterations to this list as the project progresses):

- Assess outcomes of the project against targets set by the ERDF programme requirements (as listed in Section 2).

- Determine the wider sustainability benefits of the Low Carbon Lake District programme:
 - CO₂e savings as stipulated by C34 (quantitative assessment).
 - The wider savings and benefits which may result from project activity, including plant and equipment maintenance and replacement savings, plant and equipment performance benefits, and workspace environment benefits (e.g. improved light or heat levels) (quantitative and qualitative assessment using stakeholder survey techniques).
 - Review the appetite for reducing carbon amongst businesses, and how this has changed over time (primary data will need to be collected questionnaire surveys to businesses engaged in the Low Carbon Lake District Partnership).
 - Financial analysis of savings through the Green Book Supplementary Appraisal Guidance for Valuing Greenhouse Gas Emissions and Energy Use.
- Determine the wider economic benefits arising from the programme, and determine Gross Value Added (GVA).
- Identify the effectiveness and impact of marketing activities (by the type of activity employed, marketing expenditure, referrals from suppliers and communication partners)
- A SWOT analysis based upon holistic data to cover all aspects of the scheme. A summary of the lessons learned through the delivery of the projects will included within this section.

5. Instruction to Applicants

5.1 You must be familiar with the requirements for summative assessments as detailed in the European Regional Development Fund 2014 to 2020 summative assessment guidance and appendices (April 2019 and as updated).

5.2 You must respond to every point raised in the Specifications (section 4).

5.3 You must complete the Quality Assessment (section 6).

5.4 You must complete the Supporting Information section (section 7).

5.5 You must complete the Pricing Schedule (section 8).

5.6 You must complete the Collusion Certificate (section 9).

5.7 In setting out this Invitation to Tender, the LDNPA has made every endeavour to provide bidders with an accurate description of LDNPA's requirements. This does not however, negate your obligations to fully familiarise yourselves with the nature and extent of the requirement and obligations arising and indeed to form your own conclusions about the methods and resources that are needed to meet these requirements.

5.8 You are strongly advised to study this document and to fully familiarise yourselves with the nature and extent of the requirements and all obligations required prior to submitting a quote/tender response.

5.9 Any information relating/supplied by LDNPA or otherwise acquired by you in connection with this Invitation to Tender shall be kept by you in strictest confidence.

5.10 You are advised that LDNPA is not bound to accept the lowest or any quote/tender response submitted, nor to reimburse any expense incurred during the process. In addition, LDNPA will not reimburse any expense or loss incurred by reason of this quotation process or any expense or loss incurred by you if you fail to submit a tender.

5.11 Should you be in any doubt as to the interpretation of any part of this document, you must raise a question with Hanna Latty (Programme Manager) concerning information on Low Carbon Lake District (hanna.latty@lakedistrict.gov.uk) who will answer your query prior to the submission of your quote/tender response. The latest you can raise your query is no later than 3 days before the due date for the return of tender submissions. You are advised that where such enquiries have been made, and it is appropriate to do so, LDNPA will send a copy of the enquiry, with the answer, to all participants with anonymity preserved.

5.12 Only tenders submitted for the requirements which meets LDNPA's specifications in terms of timescale for delivery/performance/completion will be considered. Bidders shall include responses to all LDNPA's requirements and questions listed in this document.

5.13 Responses to this invitation to tender (ITT) must contain sufficient, accurate and clear details to allow LDNPA conduct a full and proper evaluation. Where details are provided by you in literature that you submit in connection with the quote/tender response, you must ensure that clear cross-references are provided in your response.

5.14 LDNPA reserves the right to require additional information for clarification purposes following the submission of tenders at its discretion prior to tender evaluation.

5.15 You shall be deemed to have obtained all necessary and relevant professional advice and information for the completion of your tender response and to have allowed for all costs in the quote/tender response price. No claim or request for a variation shall be allowed at any time by reason of any failure to do so.

5.16 The supporting information, pricing schedule, form of contract, collusion certificate sections and your method statements must be completed, signed (where required) and returned as part of your tender submission, which may otherwise be rejected on grounds of non-compliance.

5.17 The electronic file(s) submitted should be in pdf format or readable with MS Office. LDNPA will endeavour to make every effort in opening your file(s), however in the event LDNPA cannot open the file(s), your submission may be rejected.

5.18 You may also attach documents to your quote/tender response for the purposes of answering the questionnaire only i.e. method statements but you must make clear cross references to the relevant parts of the specification.

5.19 Prices quoted in tender responses must remain valid for acceptance for a period of 3 months from the tender return date (section 6).

6. Evaluation Structure

Tenderers must comply with the requirements set out in section 5 and failure to do so will result in tender responses being eliminated from the evaluation process. The evaluation of tender responses will comprise of a single stages.

Tender Evaluation

Only tender responses which include information and evidence that meet all pass criteria (please see section 8) will be scored in terms of quality and price.

Quality and price scoring are based on the following criteria:

- *Quality Score (50%)*
 - Quality will be evaluated against pre-determined criteria with weightings as set below. Scoring will be applied by evaluators as set out below.
- *Price Score (50%)*
 - Pricing will be evaluated to ensure all relevant costs are visible and comparable, including sensitivity analysis where determined appropriate.
- The final ranking, a balance of the quality score (50%) and the price score (50%) will be determined as set out below:

Quality Score

Assessment	Score	Quality Scoring Gauge
Excellent	5	Exceeds requirement. Exceptional demonstration of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the supplies / services, with evidence to support the response.
Good	4	Satisfies the requirement with minor additional benefits. Above average demonstration of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.
Acceptable	3	Satisfies the requirement. Demonstration of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with evidence to support the response.
Minor Reservations	2	Satisfies the requirement with some minor reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response.
Serious Reservations	1	Satisfies the requirement with major reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response.
Unacceptable	0	Does not meet the requirement and/or insufficient information provided to demonstrate that the has the ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response.

The Evaluation Criteria and associated weightings to be applied in the evaluation are:

Evaluation Criteria	Weighting (%)
Has provided evidence to show that personnel performing the evaluation work have a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection, and data analysis; statistical software packages; reporting complex information to both technical and non-technical stakeholders; and assessing the reliability and validity of studies.	20%
Has provided evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating public sector funded programmes / projects / initiatives.	10%
References provided from at least two referees regarding evaluation work performed for them by the tendering organisation.	5%
Has provided details of how the tendering organisation manages its environmental impacts.	5%
Has provided details of how the tendering organisation manages equality and diversity.	5%
Has provided details of how the tendering organisation manages the quality of the services it delivers.	5%
Has provided a method statement stating how the requirements for the evaluation as set out in the specification are addressed.	15%
Has provided evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating projects aimed at reducing CO ₂ e emissions and/or environmental, emission or sustainability-based projects.	25%
Has provided evidence to show that personnel performing the evaluation work have a high standard of report creation.	10%
	<div>Total</div> <div>100%</div>

(Tenders' overall quality scores (from a total of 100% as set out above) will be multiplied by 50%)

Price Score

The lowest tendered price will be awarded 50%. All the other returned tender prices will be given a % score relative to this, by dividing the lowest tendered price by the firm's tendered price, multiplying by 100 and then multiplying the product by 50%. **Timetable**

These dates are for planning purposes but maybe subject to change. You will be notified throughout the process of any changes with sufficient notice.

Please refer to section 9 which sets out the pricing schedule.

Process	Dates
Deadline for Tender submission	13 th August 2021
Notification	27 th August 2021
Production of final evaluation reports	10 th December 2021

7. Quality Assessment of Tender

All tenderers are asked to provide the following:

7.1 Please provide evidence to show that personnel performing the evaluation work have a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection, and data analysis; statistical software packages; reporting complex information to both technical and non-technical stakeholders; and assessing the reliability and validity of studies.

7.1 Response:

7.2 Please provide evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating public sector funded programmes / projects / initiatives.

7.2 Response:

7.3 Please provide evidence to show that personnel performing the evaluation work have an understanding and knowledge of the range of business support available and the understanding of the measurements of success for a business as well as project success.

7.3 Response:

7.4 Please provide the contact details of at least two referees for whom you have performed evaluation work, who will be able to provide a reference.

7.4 Response:

7.5 Please provide details of how the tendering organisation manages its own environmental impacts.

7.5 Response:

7.6 Please provide details of how your organisation manages equality and diversity

7.6 Response:

7.7 Please provide details of how the tendering organisation manages the quality of the services it delivers.

7.7 Response:

7.8 Please provide a method statement stating how you would address the requirements for the mid-term and finals evaluations as set out in the specification. address the requirements for the final evaluation as set out in the specification.

7.8 Response:

7.9 Please provide evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating projects aimed at reducing CO₂e emissions and/or environmental, emission or sustainability-based projects.

7.9 Response:

7.10 Please provide sample copies of previous evaluation reports or similar documents that you have recently completed (at least two examples).

7.10 Response:

8. Supporting Information

Please ensure that you complete the supporting information questionnaire as requested in full. We may ask to see documents at a later stage, so it is advisable you ensure they can be made available upon request.

Table 1) Tenderer Details

<i>[N.B. Failure to complete any of the sections in this table will result in your tender response being excluded from the remainder of the evaluation process]</i>		
Full name of organisation responding to this tender		
Registered office address	Company or charity registration number (if applicable, if not applicable state N/A)	
	VAT registration number (if applicable, if not applicable state N/A)	
	Name of immediate parent company (if applicable, if not applicable state N/A)	
	Name of ultimate parent company (if applicable, if not applicable state N/A)	
Type of organisation	i) a public limited company ii) a limited company iii) a limited liability partnership iv) other partnership v) sole trader vi) other (please specify)	

Table 2) Contact Details

<i>[N.B. Failure to complete any of the sections in this table will result in your tender response being excluded from the remainder of the evaluation process]</i>

Name	
Full postal address	
Phone/Mobile	
Email	

Table 3) Financial Information

<p>Please tick and provide details of one of the following</p> <p><i>[N.B. Answering 'No' to both options below or failure to supply supporting evidence (e.g. audited accounts, or a paper and supporting information) will result in your tender response being excluded from the remainder of the evaluation process]</i></p>	
I have included copies of the audited accounts for the most recent two years	Yes <input type="checkbox"/> No <input type="checkbox"/>
I have provided a paper and supporting information demonstrating my financial status (if trading for less than a year).	Yes <input type="checkbox"/> No <input type="checkbox"/>

Table 4) Insurance

<p>Does your organisation have, or will it have appropriate insurances in place with at least £1m public liability and professional indemnity, and £1m employer's liability (if your company is an employer) in place prior to contract inception?</p> <p><i>[N.B. answering 'No' to this question will result in your tender response being excluded from the remainder of the evaluation process and consideration with respect to the evaluation contract(s)].</i></p> <p><i>Evidence of appropriate insurances will be required prior to contract inception. Failure to supply these in specified timescales will result in the tenderer being excluded from consideration regarding the evaluation contract(s)].</i></p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
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9. Payment Schedule

Evaluation

Payment Schedule:

50% on submission of the draft version of the final evaluation – **30th September 2021**

50% on submission of the final version of the final evaluation report – **30th November 2021**

10. Collusion Certificate

By submitting my/our response, I/we _____ of certify that this is a bona fide quotation and that we have received same in good faith, without inducement or prior knowledge from any source whatsoever. We further confirm, indemnify, and undertake that in considering this quotation we have not: -

- a) entered into any agreement with any other person with the aim of preventing Quotations being made or as to the amount of any Quotation or the conditions on which any Quotation is made;
- b) informed any other person other than the person calling for these Quotations of the amount or approximate amount of the Quotation, except where the disclosure, in confidence, of the amount of the Quotation was necessary for insurance quotation or parental guarantee purposes required for the preparation of the Quotation;
- c) caused or induced any person to enter into such an agreement as is mentioned in paragraph (a) above or to inform me/us of the amount or approximate amount of any rival Quotation for the Contract.

In this certificate "person" includes any person or anybody of persons corporate or unincorporated and "agreement" includes any arrangement of whatever nature and in whatsoever form between us and any other party, and hereby indemnify LDNPA against any claim and or action arising from any breach of the aforesaid.

11. Return of Tender Application

Please return tender applications via the CHEST by close of business 13th August 2021