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Procurement guidance – bid better for green heat public sector contracts

Green Heat Installer
Engagement Programme

21 February 2024



Presenters

Rachel Comrie	Green Heat Installer Engagement Assistant Programme Manager, Energy Saving Trust	Presenter, Q&A Panel
Martin Murphy	Managing Director, SCMG Ltd	Presenter, Q&A Panel

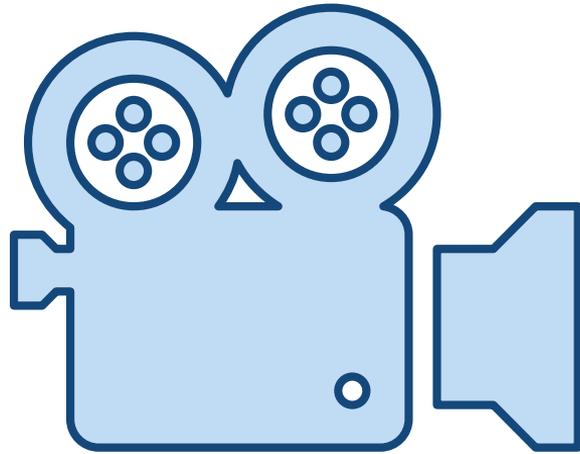
Questions

Type questions into the **Questions** pane of the control panel

You can send in your questions at any time during the presentation. These will be collected and addressed during the Q&A session at the end of the presentations.



Recording



This presentation is being recorded but your name and attendance are hidden from the recording.

The recording will be uploaded and will be made available to watch again.

Details of how to do this will be shared with you via email after the webinar has ended.

Have Your Say



There will be a short feedback survey after the webinar has finished.

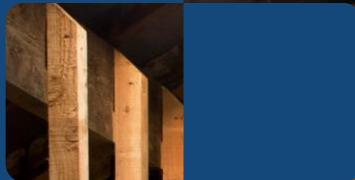
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Local Heat and Energy Efficiency
Strategies (LHEES) - bringing
commercial opportunities to the
supply chain

Rachel Comrie

21 02 24



Green Heat Installer Engagement Programme



Resources hub

Support hub for small businesses working on energy efficiency, heating systems and micro generation. Find research, case studies and online tools to...



Skills, funding and certification

Discover the certification requirements as an installer or assessor looking to carry out work under various schemes.



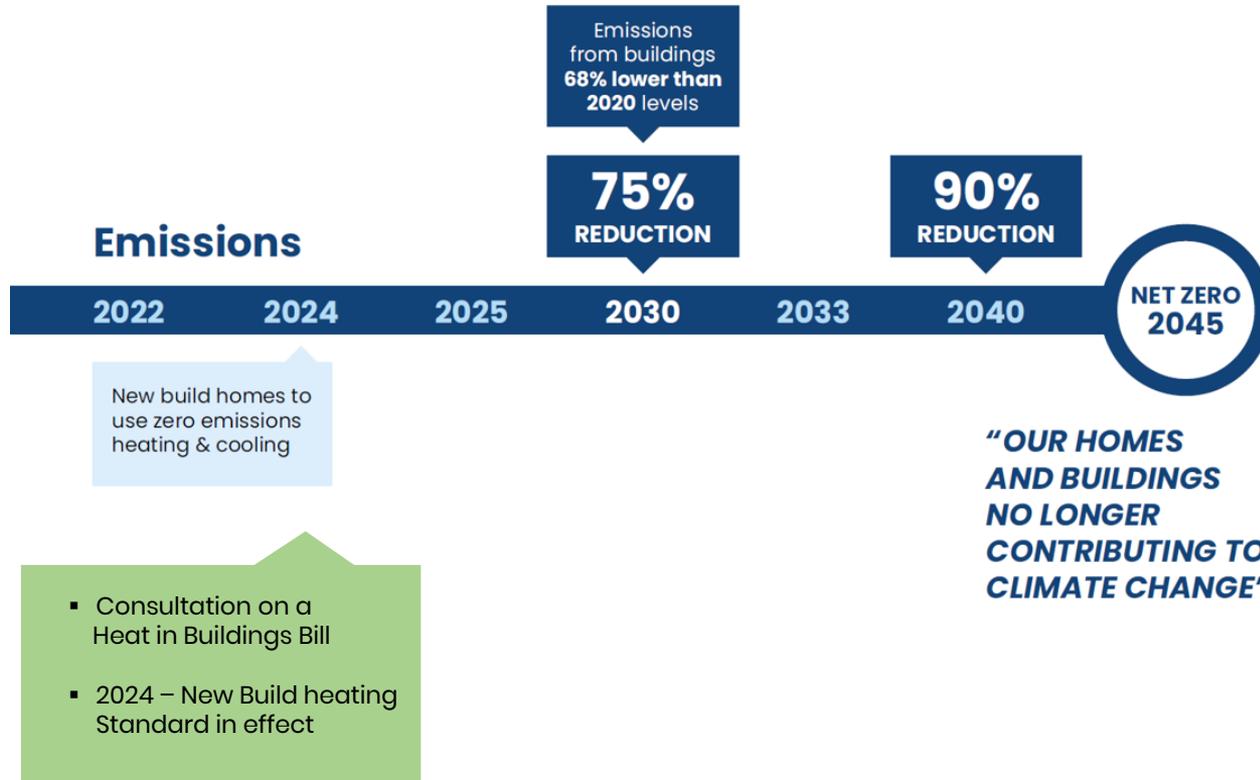
Green heat installer events

We organise networking events, webinars, workshops and information sessions. All free of charge. Find out more about our upcoming sessions.



Funding for your customers

Energy Saving Trust helps consumers access funding to make energy efficiency improvements and renewable energy additions to their property.



Heat in Buildings Strategy and LHEES

“Local Heat & Energy Efficiency Strategies (LHEES) are at the heart of a place-based locally-led and tailored approach to the heat transition. These local

Strategies will underpin an area-based approach to heat and energy efficiency planning and delivery.”

Heat in Buildings Strategy

Achieving Net Zero Emissions in Scotland's Buildings



Local Heat and Energy Efficiency Strategies (LHEES)

- [Local Heat and Energy Efficiency Strategies \(LHEES\)](#) is a statutory requirement for all local authorities.
- To set a strategy and delivery programme for how local authorities will reduce energy demand and decarbonise the heat supply of buildings in their area
- To include all sectors over a 20-year timeframe
 - Domestic
 - Non-domestic
 - Public buildings

Heat in Buildings Bill Consultation

Online events: Registration for all events is open on [Eventbrite](#).

- 25 February, 14:00 – 15:05 – online (open session for those within one of the 11 areas of Scotland identified)
- 29 February, 18:00 – 19:05 – online (open session for those within one of the 11 areas of Scotland identified)
- 5 March, 11:00 – 12:05 – online (for Orkney and Shetland residents, or anyone within the local areas of Scotland identified above, who meet the criteria below)

Further information:

- For further information you can contact:

HiBConsultation@gov.scot

- Have your say:

<https://consult.gov.scot/energy-and-climate-change-directorate/proposals-for-a-heat-in-buildings-bill>

- See the full document:

<https://www.gov.scot/publications/delivering-net-zero-scotlands-buildings-consultation-proposals-heat-buildings-bill/>

2009 – Climate Change (Scotland) Act

2013 - Scotland's Sustainable Housing Strategy

2015 - Heat Policy Statement

2017 - Scottish Energy Strategy SEEP

2018 - Energy Efficient Scotland: Route Map

2019 - Climate Change (Emissions Reduction Targets) (Scotland) Act - Climate Emergency declared

2021 - Heat Network (Scotland) Act

2021 - Heat in Buildings Strategy

2022 - Virtual HEES Established

2023 - Consultation on a Heat in Buildings Bill

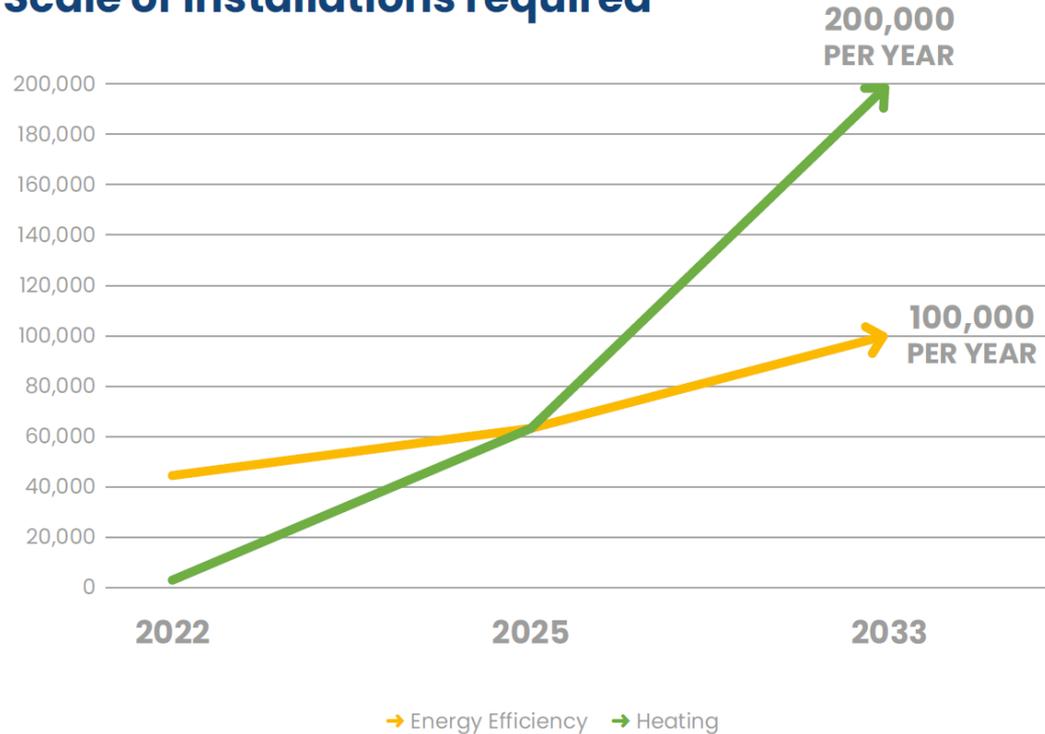
2024 - New Build Heating Standard in effect

Funding in Scotland for the retrofit market

- [Home Energy Efficiency Programmes for Scotland: Areas Based Schemes](#)
- [Warmer Homes Scotland](#)
- [Home Energy Scotland Grant and Loan Scheme](#)
- [Private Rented Sector Landlord loans](#)
- [SME loan](#)
- [Local Heat and Energy Efficiency Strategies \(LHEES\)](#)

Domestic energy efficiency installations

Scale of installations required



How do we get there

- Hundreds of retrofit installers in Scotland
- Consistently high quality work
- Energy retrofit embedded into the everyday practices of builders working in the repair, maintenance and improvement market
- Support installers by providing clarity on qualifications, certifications and funding for upskilling



Green Heat Installer Engagement Programme – useful links



Email: GreenInstallerScotland@est.org.uk



LinkedIn Group: www.linkedin.com/groups/5139242



Email updates and quarterly newsletter subscription: bit.ly/2PSatKL



Website: energysavingtrust.org.uk/business/energy-efficiency/green-installer

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Thank you





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Public Procurement Guide and Support

Sustainable energy supply chain and procurement guidance

21 February 2024

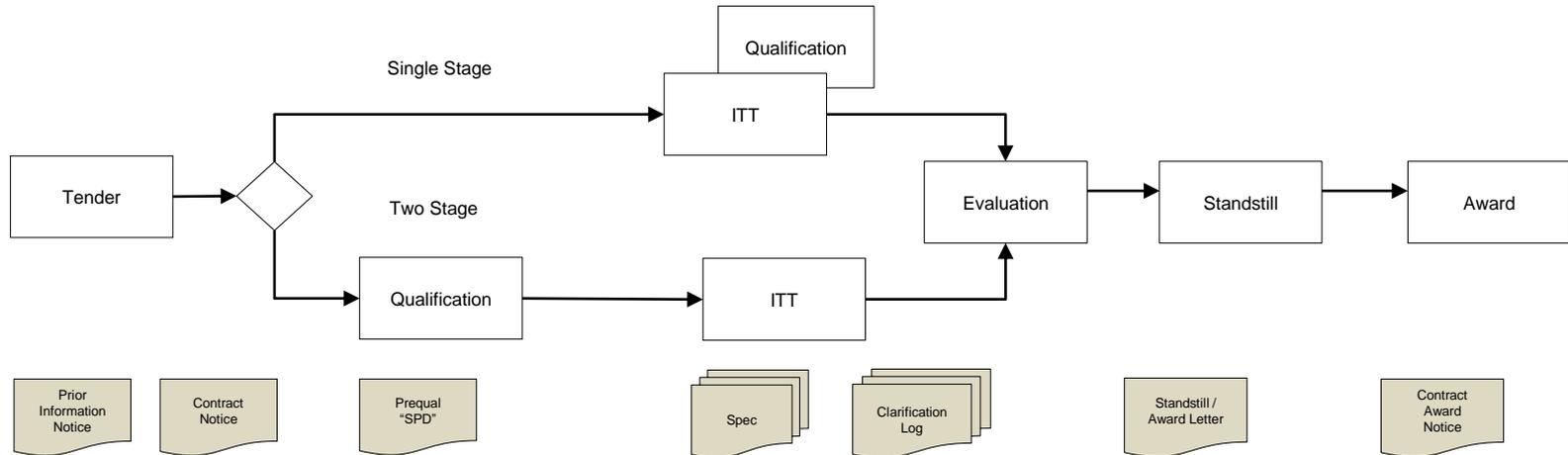


Introduction

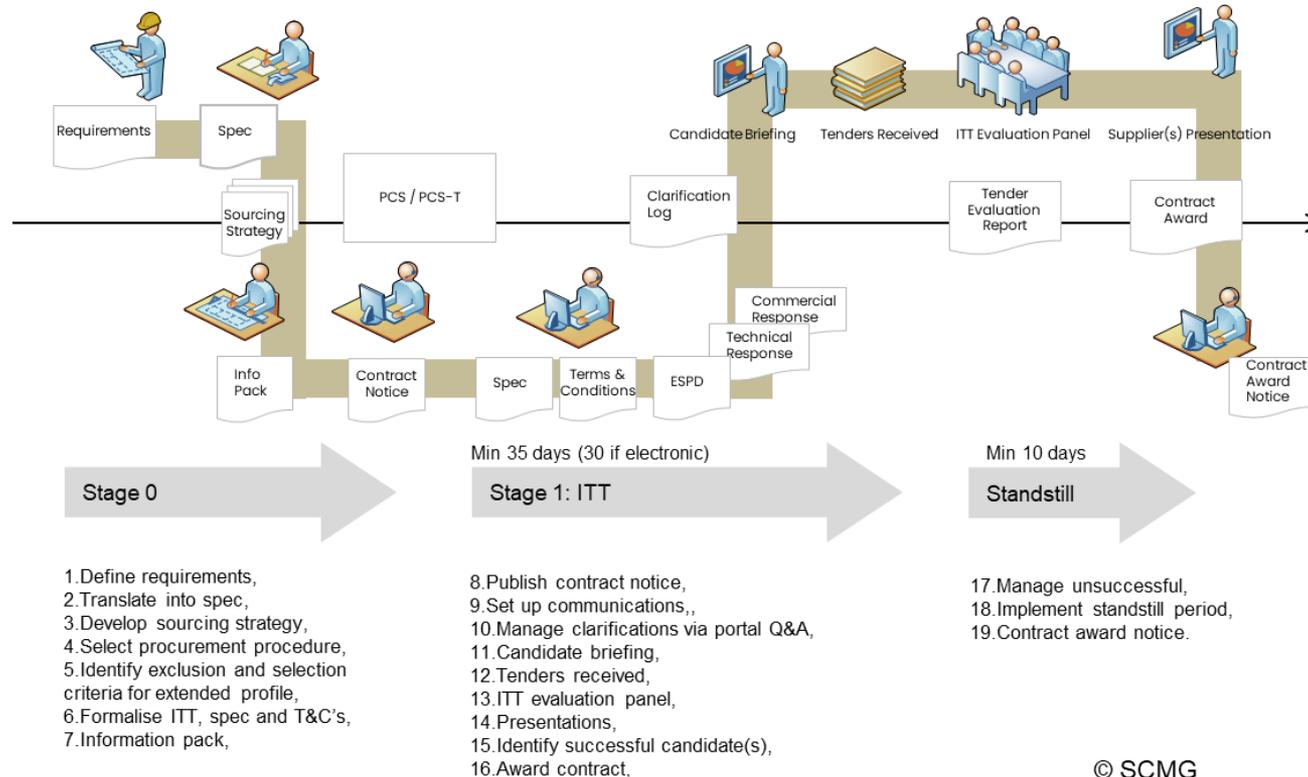
- Public Procurement presents opportunities for all kinds of businesses to provide services, works and supplies to develop and grow,
- Public Procurement is a regulated activity and subject to the Public Contracts (Scotland) Regulations 2015 and the Procurement Reform (Scotland) Act 2014,
- The regulations define how Procurement should be conducted and provides a Scottish flavour to procurement including wider social, economic and environmental issues,
- Public procurement is a process where the process must be compliant, define an appropriate level of competition to define value for money and manage the risk of delivering the resulting contract,
- Energy efficiency and renewables is a Scottish Government strategic priority and is a designated national infrastructure priority to tackle carbon emissions and deliver Net Zero.

Tender notices and documents

- The documents are associated with different tender procedures and whether or not a prequalification stage is included or not,
- If a prequalification stage is included this means we have a two stage process as opposed to a single stage where submit all our information at the same time.



Open procedure



- A default procedure used by the majority of tenders published on PCS,
- Typically, a tender will require the completion of three response parts,

1. Qualification- Extended profile,
2. Technical - How you will deliver the contract,
3. Commercial - your price.

© SCMG

The three tests

1. You will be treated in a fair manner,
2. Any decision making about your bid will be objective, and,
3. You will not be discriminated against for any reason.

When you bid?

- Before,
- During,
- After.

Financial thresholds*

Contract Type	Note	Supplies £	Services £	Works £	
Local Government	1	213,477	213,477	5,336,937	inc VAT
Central Government	1	138,760	138,760	2,000,000	inc VAT
Quick Quotes	2	50,000	50,000		ex VAT
1	Public Contracts (Scotland) Regulations 2015				
2	Procurement Reform (Scotland) Act 2014				

*January 2024 thresholds, are updated every two years.

Procedures

- **Open,**
- Restricted,
- Competitive Dialogue,
- Negotiated Procedure without prior publication,
- Accelerated Procedure,
- Competitive Procedure with Negotiation,
- Innovation Partnerships.

Procedure Timescales

Procedure	Qualification (days)	Tender Stage	Tender submitted online
Open	NA	35	30
Restricted	30	30	30

Public Contracts Scotland (PCS)

- PCS is one of the most user-friendly portals available. You can be up and running in 10 minutes. This will then give you access to all public contracts advertised in Scotland. PCS is both the advertising portal for all public procurements and in some cases is used to submit and return quotes and tender documents.

Giving free access to public contract opportunities across Scotland.

[Free registration as a supplier or buyer](#)



Suppliers:

Search for opportunities to supply goods, works and services.



Buyers:

Advertise your contract opportunities and awards here and comply with your legal obligations.

Public Contracts Scotland – Tender

- PCS-Tender is a tendering module that works alongside PCS,
- As you become more confident and perhaps when you are bidding for larger contracts you will see in the Contract Notice that the buyer is using PCS-Tender to run the tender process,
- PCS-Tender is a tendering platform which means you will have to add or upload your information directly in a prescribed format. This can be daunting the first time you look at this but there are many advantages including the ability to upload standard documentation to your profile,
- PCS-Tender is an e-tendering portal. It comprises,
 - Qualification Envelope (based on Extended Profile),
 - Technical Response or envelope,
 - Commercial Response or envelope,
 - You will have to upload each Section and individual answers in response to specific questions.

Login

Username

Password

[Sign in](#)

Forgot your password or username?

[Register as a Supplier](#)

[Need assistance?](#)

[Please contact the Help Desk](#)

[0800 069 8630](#) 📞

[Supplier Support](#)

[System Requirements](#)

[Privacy Statement](#)

[Accessibility Statement](#)

Welcome to PCS-Tender

PCS-Tender is the national eTendering system, and is centrally funded by the Scottish Government. The system is a secure and efficient means for buyers and suppliers to manage tender exercises online. The standard SPD (Scotland) and ITT templates enable buyers to easily create consistent tender documentation.

Suppliers

Once you have registered as a supplier, you will be sent a password via email which will provide you with secure access to the site. You will then be able to express interest in any advertised tender exercises. Additionally, you will be able to complete your supplier profile, which will pre-populate tender responses providing buyers have used the standard questions.

[Further Assistance for Suppliers](#)

[How to Find an ITT or PQQ – Supplier Guide](#)

Before you bid?

#	Stage	What is the buyer doing?	What should I be doing?
1	Before	<p>The buyer is:</p> <ul style="list-style-type: none"> • Establishing requirements, • Trying to understand the marketplace, • Developing a sourcing strategy, • Engaging with bidders, • Creating an appropriate level of competition and selecting a procedure to run the tender, • Defining exclusion and selection criteria, • Deciding how much value for money (quality / price) is required? • Specifying a requirement, • Publishing a Contract Notice (advert for a contract) via PCS. 	<p>Bidder should be:</p> <ul style="list-style-type: none"> • Trying to build a relationship with potential target buyers, • Developing your own value proposition for different buyers – see page 34 and 35 for more on this topic, • Building Capability and Capacity, • Attending ‘meet the buyer’ events, • Making sure you have set up PCS alerts properly to ensure that you receive notification of relevant tenders, otherwise, you should monitor PCS notices on a regular basis and perhaps expand your Alert Profile to include additional categories and geographical areas.

Before you Bid

- You will have to develop your bid to meet standard, adaptable and specific information required.

#	Description	Content
1	Standard Requirements	Policies, Insurance Documents, Accounts, Accreditations and Certificates,
2	Information that can be adapted	Team information, Case Studies,
3	Material that is specific to a tender	Methodology, Risk, Challenges, Project Plan, Pricing.

Product Categories

- Select Product categories that reflect the services you provide.

#	Product Category	Description
1	45000000	Construction Work
2	45300000	Building installation work
3	45320000	Insulation Work
4	45321000	Thermal Insulation Work

When you bid?

Understand your capabilities

#	Capability
1	
2	
3	
4	
5	

What did you write down?

- Most people write down and focus on what they deliver,
- There are lots of things to do before you deliver,
- Make sure you understand and include these otherwise you underestimate what you actually do.

When you bid?

#	Capability	Contract (£)					Totals (£)
		1	2	3	4	5	
1	Capability 1						
2	Capability 2						
3	Capability 3						
4	<i>Deliver</i>						
5	Capability 5						
	Totals £						

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5 min Q&A

Do you have any questions relating to this stage of bid development?

You can ask questions by typing them into the **questions** box of the control panel



During your bid?

#	Stage	What is the buyer doing?	What should I be doing?
2. 1	During	<p>Qualification stage – Exclusion and Selection criteria:</p> <ul style="list-style-type: none"> • Check minimum legal requirements, • Check selection and exclusion criteria, • Testing your capability to deliver the contract, • Testing you have sufficient capacity to deliver the contract, • Identify Bidders' capability and capacity to deliver the contract and invite to tender. 	<p>Bidders should be:</p> <ul style="list-style-type: none"> • Ensuring they can meet any minimum legal requirements defined, • Submit policies including quality, health and safety, environmental, equality and diversity and business continuity and disaster recovery to demonstrate and provide evidence that your business is sustainable and resilient, • Developing or defining their capabilities that reflect the services they provide and that will match the requirements of the tenders you will be bidding for, • Define and explain your capacity to deliver the contract – how much similar work or contracts like this have you previously delivered.

Value Proposition

- PCS - Tender

What do you do?	How do you do it?	Benefits	Value proposition
Install loft insulation (or other energy efficiency measures).			

Value Proposition

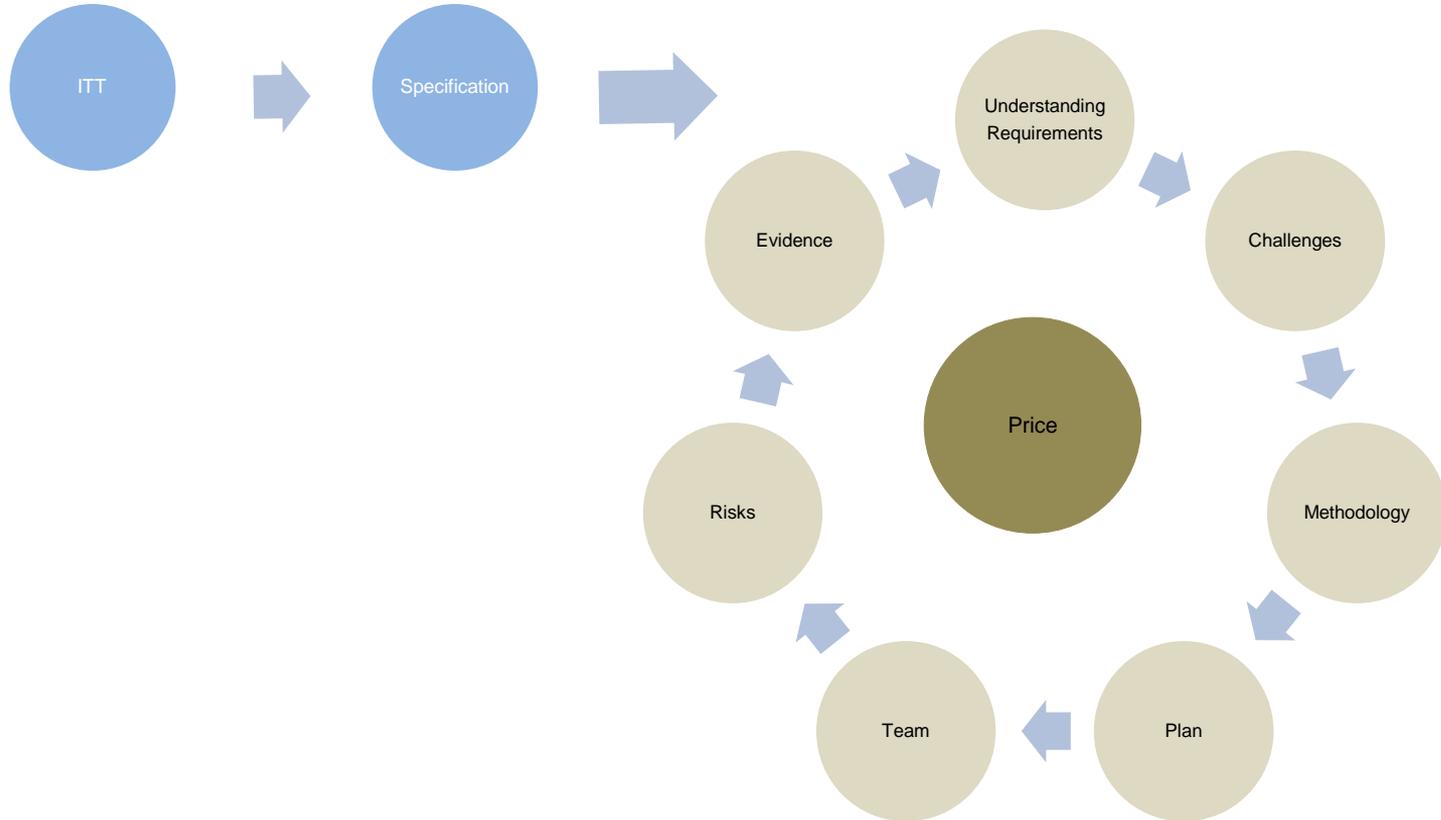
- PCS - Tender

What do you do?	How do you do it?	Benefits	Value proposition
Install loft insulation (or other energy efficiency measures).	<ul style="list-style-type: none"> • Safely, • Cost effectively, • Minimum disruption, • Use the specified material, • Turn up when we said we would, • Install, • Clear up site, • Sign off. 	Buyer, <ul style="list-style-type: none"> • No accidents, • Compliance, • Carbon reduction, • Reputation. 	<ul style="list-style-type: none"> • Help the buyer deliver Scottish Government targets and enhance their reputation.
		Customer (end user), <ul style="list-style-type: none"> • Service, • No mess, • Warmer house, • Lower energy bills. 	<ul style="list-style-type: none"> • Improved quality of life and well-being, • Results in lower energy costs.

When you bid?

#	Stage	What is the buyer doing?	What should I be doing?
2. 2	During	<p>Invitation to Tender (ITT):</p> <ul style="list-style-type: none"> • Invite bidders who have prequalified to submit a tender, • Perhaps holding a briefing for invited bidders, • Responding to questions from bidders via the Q&A section of the PCS or PCS Tender, • Receive responses, • Evaluate (score) bids against quality / price criteria defined, • Award contract, • Feedback to unsuccessful bidders. 	<p>Bidders should:</p> <ul style="list-style-type: none"> • Read and understand the specification and terms and conditions of the contract, • Attend briefing if one is being held, • Ask sensible questions via the Q&A facility in PCS or PCS-Tender (do not ask about things that are clearly stated in the specification or other documents), • Identify long lead time items for your tender on day one of the ITT not the week or day before the deadline, • Write your bid, • Submit your bid in the required format by the due date and time.

A good bid?



Most Economically Advantageous Tender

- Value for Money?
- Your weighted price score is combined with your quality score (quality and price),
- The combination of quality and price is called the Most Economically Advantageous Tender,

#	Lowest Price	Price Score	Deficit
1	£100	40%	0%
2	£120	33%	7%
3	£140	28%	12%
4	£160	25%	15%
5	£180	22%	18%
6	£200	20%	20%

Most Economically Advantageous Tender

#	Lowest Price	Price Score	Quality	MEAT
1	£100	40%	48%	88%
2	£120	33%	57%	90%
3	£140	28%	45%	73%
4	£160	25%	50%	75%
5	£180	22%	60%	82%
6	£200	20%	40%	60%

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5 min Q&A

Do you have any questions relating to this stage
of bid writing?

You can ask questions by typing them into the
questions box of the control panel



After you bid?

#	Stage	What is the buyer doing?	What should I be doing?
3	After	<p>Award Stage:</p> <ul style="list-style-type: none"> • Advise successful bidder(s), • Advise unsuccessful bidders, • Provide feedback (<i>this is only an obligation if the contract value exceeds the financial thresholds</i>), • Observe the voluntary or mandatory standstill period, • Award contract as specified and published. 	<p>Bidders should:</p> <ul style="list-style-type: none"> • If you are successful ask for feedback, • If you are unsuccessful ask for feedback, • Prepare for this meeting, • Ask for strengths and weaknesses of your bid and scores for each section if not already provided, • Consider your last bid as the starting point, plus improvements, for your next bid.

Get feedback if you are unsuccessful

1. Read your bid again,
2. Try to reconcile the feedback – qualitative evaluation and score with the comments you receive,
3. Ask for your score breakdown into each section of the bid,
4. Ask for the highest and lowest score in that section and where you were in the range of responses,
5. Ask for strengths and weaknesses of your bid by each section / question,
6. Be polite and think about the future opportunities with this potential buyer – perhaps get someone one step removed from writing or managing the bid to do this if you can.

Checklist

 Be alert to **Finding Opportunities** and track opportunities published on PCS,

 Develop your **Bid Strategy** including *when not to bid* and focus on what is realistic to win,

 Prepare **Qualification** info and be ready to bid with all evidence and exclusion and selection criteria organised,

 Be clear about your methodology and **Technical Response** is well developed and fit for purpose in relation to specific opportunities,

 Think about how you will prepare your **Price** to maximise value for money,

 Consider all the issues of being **Awarded** the contract and what to do if you are unsuccessful.

About SCMG

- SCMG provide supply chain, procurement, contract management and logistics advice and support to SMEs and corporate businesses and organisations in the public sector,
- This includes working with buyers and sellers to procure or bid for over £1 billion worth of tenders and projects with clients in multiple sectors in 24 different countries,
- SCMG have managed and delivered a number of projects for Energy Saving Trust,
 - HEEPS ABS Procurement Research,
 - How to Bid for Energy Efficiency and Renewables Contracts (SME focused workshop bidding for HEEPS ABS and other contracts),
 - Support on SLWG (2018) for SEEP Skills, Supply Chain & Quality Assurance,
 - Procurement Guide for SMEs (an Energy Saving Trust publication for download via website) and procurement webinars,
- The Procurement Guide developed by SCMG for Energy Saving Trust have been available to SME bidders to use since 2016.

You can ask questions by typing them into the questions box of the control panel

Panellists:

Rachel Comrie

Green Heat Installer
Engagement Assistant
Programme Manager, Energy
Saving Trust

Martin Murphy

Managing Director, SCMG Ltd



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- **Email updates and quarterly newsletter subscription:**
bit.ly/2PSatkl
- **Website:**
<https://energysavingtrust.org.uk/business/energy-efficiency/green-installer/>

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Thank you for
attending