

AMAZE Project Tender Brief: Contract for an External Advisor

Background

Mull and Iona Community Trust (MICT) was established in 1997 as a Company Limited by Guarantee and Scottish Charity. MICT has a strong track record of delivering projects which increase the sustainability of island life. Examples of such projects include MESS Island Castaways, An Roth Community Enterprise Centre, recycling projects, Garmony Hydro, Countryside Rangers, Nonhebel Park Business Park, affordable housing and Ardura Community Forest. Please refer to our website for more information www.mict.co.uk.

Increasing concerns over the climate crisis and the recognition that as an island community we need to decarbonise across all aspects of our lives, means the need for new solutions. To facilitate this a volunteer Steering Group was formed, comprising: islanders with an interest and/or expertise in climate action; other island-based, community development organisations; Argyll and Bute Council staff and staff from The Samsø Energy Academy, Denmark.

Working closely with the Steering Group, MICT then secured funding from New Energy Solutions Optimised for Islands (NESOI) for a project called The Archipelago of Mull Actions for Zero Emissions (AMAZE).

AMAZE is a partnership project, working closely with the NESOI Consortium (see www.nesoi.eu for more details), who will alongside MICT and MICT's appointed External Advisor support and/or lead on the project activities.

The project is split into two phases: Phase 1: Deliverables 1 & 2 and Phase 2: Deliverable 3. See details below. MICT has full funding in place for Phase 1.

The External Advisor Contract

MICT is now seeking an External Advisor to deliver the activities noted in 2.1 and 2.2 (Phase 1) below and to provide a separate response and quote for the Deliverable 3 activities also noted below. Deliverable 3 is the completion of the full feasibility study, taking the project to the investment and procurement ready stage.

Funding to undertake Deliverable 3 (Phase 2) is not yet in place. However, in order to secure the further funds needed for the Deliverable 3 work and to complete the full project with minimal delays we are asking tenderers to provide a separate response and price for Deliverable 3.

Deliverable 1:

- A Clean Energy Transition Agenda of the Mull archipelago.
- A Clean Energy Transition Agenda (CETA) to include a community vision for transition to carbon neutral for the 6 inhabited islands of the Mull archipelago.

Task list for Deliverable 1:

- Support community participation processes- assist MICT with the planning, design and delivery to achieve a community vision for transition to carbon neutral.
- Local community engagement workshops- assist MICT with the planning, design and delivery.
- CETA- Phase 1: Island Dynamics: Geography, economy, population & connection to mainland; Energy system description & audit (including current and future demand/supply); Stakeholder mapping; Policy & regulation.
- CETA- Phase 2: Island Transition Path: Community vision; Transition governance, Pathways and pillars to transition; High-level options appraisal on solutions in the form of a decarbonisation action plan; Monitoring.

The CETA will produce a decarbonisation masterplan.

The decarbonisation masterplan will include an energy audit and high-level options appraisal based on a detailed analysis across the Islands of Mull and Iona of the energy inputs and outputs to identify opportunities to decarbonise. The Decarbonisation Masterplan will examine primary and secondary activities e.g. as well as identifying renewable energy opportunities, the de-centralisation of energy generation and decarbonising transport, there are opportunities to reduce carbon emissions by increasing energy efficiency, reducing food waste, re-using consumer products etc.

The decarbonisation masterplan will be developed in conjunction with other island community organisations including South-West Mull and Iona Development and North-West Mull Community Woodland Company and will be freely available to help facilitate new projects and support applications for revenue and capital funding for such projects.

Energy Audit

The energy audit will collect and analyse data and present it as a reference document breaking down information into relevant sectors and energy types, illustrated with suitable infographics. The basic data set will be collated and provided as editable spreadsheets free of copyright. The energy audit report will summarise energy consumption and energy production and will provide more detailed analysis by type, sector and location (data zone). There is an existing (only partially complete) Mull energy audit which may provide a useful information source for this work.

Of particular interest are an assessment of the peak demand currently for electricity and the predicted demand as energy consumption is decarbonised using locally generated renewable energy. If possible, data from the Distribution Network Operator about energy flow from the mainland to Mull and from Mull to Tiree will help inform the current demand for electricity.

All consumption figures to be expressed in kWh/MWh.

Options Appraisal

The options appraisal will identify and appraise opportunities available to the community to decarbonise. Options will include displacing fossil fuels with new renewable energy projects on the island, carbon literacy and also options to reduce consumption of energy and food waste while increasing recycling and upcycling.

Detailed knowledge generated by the energy audit will inform the extent of such options and may also inform the best location to minimise grid losses from high voltage distribution as well as maximising the potential for new, community owned, renewable energy assets.

Deliverable 2:

A detailed feasibility study into an archipelago-wide EV and renewable energy hub network, supporting EV expansion in the form of a new EV car club, charging points, renewable energy production (solar PV and wind) and energy efficiency savings. The hubs will be based at seven community run village halls. The tenderer should bear in mind in that the halls are located over a wide geography (involving significant travel time between sites) and each hall is a different size with varying operating models. An integrated technical solution is required so that excess energy from the solar/wind is directed to the local building (once the local battery is charged) to provide an element of renewable power for the building and combat the grid constraint. The potential for re-using end of life EV batteries maybe considered.

Task list for Deliverable 2 to be delivered by the External Advisor:

- Baseline travel assessment to understand existing travel patterns and future EV growth scenarios
- Energy scenario development, considering renewable generation potential, storage scenarios, behind-the-meter supply, and energy export capacity
- Market research to review viability for EV car club and define KPIs for short, medium and long-term operation of club
- Constraints analysis (including planning and environmental), including engagement with LPA and statutory consultees
- Development of hub network proposals for each site, defining optimal infrastructure capacity for each location, including generation type and scale; number and type of EV charge points; direct supply; energy storage; private wire; and energy export
- High-level specification for EV hub network and associated energy system requirements, including capital and operating requirements
- Review and recommendations on governance arrangements for operation of EV energy hub network, including engagement with key stakeholders to establish principles for operation of EV car club
- Review and recommendations for approach to procurement stage
- Reporting, presentation of findings and recommendations
- Community engagement on draft proposals to share findings and gather feedback
- Ongoing project management.

Deliverable 3:

The study will cover detailed technical assessments and solution design, planning and grid approvals, legal agreements, and a business case (including investment options, capital and operational budgets) making it procurement and investment ready.

Task list for Deliverable 3:

- Prepare, submit and secure Planning consents (where necessary), including all supporting information (e.g. environmental surveys) (expenses to include cost of planning fees)
- Prepare, submit and secure grid connection offer for preferred scale of import and export connection upgrade (expenses to include costs for grid connection applications)
- Scheme design and technical specification to the stage of procurement tendering for construction contractor
- Undertake title search and prepare title report for each development site
- Prepare Heads of Terms (HOTs) with each landowner for development, considering rooftop lease/land rental, and Power Purchase Agreement for energy offtake. Negotiate and agree HOTs for all sites.
- Progress HOTs to signed Option Agreement
- Identify and negotiate terms with EV car club operator or if no operator can be identified, define governance terms for locally constituted operator and identify and negotiate terms leasing terms for EV fleet
- Identify a charge point solution provider which can provide public access and a billing portal with the selected EV charging infrastructure, and agree commercial terms
- Preparation of Business Case, including fully detailing governance and operational requirements
- Investment grade financial model

- Support community in identification of financing/funding option for Capital Works stage
- Ongoing risk management
- Ongoing project management
- Action plan and identification of project monitoring procedures.

Project Timescales

The project will start in early September 2022 and as a condition of the NESOI grant, deliverables 1 and 2 **must be delivered within 10 months** from the project start date. A formal project kick-off meeting with all partners is planned for Friday 16th September. Please note that given the challenging timescale we wish to start work as soon as possible after the tender process is completed and ideally ahead of the kick-off meeting.

Timeline for Deliverable 3 to be specified by the tenderer in their response.

Detailed timescales and project plan will be agreed with the selected External Advisor and NESOI partners.

Additional Relevant Information

Deliverables 1 and 2 will be funded by MICT from grant reference NESOI Z-305.

A response and quote for Deliverable 3 should be provided separately to enable MICT to fundraise to secure a budget for this work during the first phase of the project.

To assist in the preparation of a tender the following information is included in the appendices:

- Spreadsheet titled: NESOI Z-305 - TA Definition CERTH v0.3 (003).xlsx. This document lists the project tasks being lead and/or supported by the NESOI Consortium.
- Mull Energy Audit.

Management and Outputs

The External Advisor will report to Moray Finch (MICT General Manager) and the Project Steering group throughout the contract on a regular basis, to be agreed with all parties.

Reporting can take the form of bullet points relating to progress achieved and any slippage to planned timescales highlighted with corrective action outlined.

Outputs required:

Phase 1:

- CETA as described in 2.1 above and including decarbonisation masterplan comprising energy audit, options appraisal and editable files with background data.
- Feasibility study as described in 2.2 above, editable files with background data.

Phase 2 (once funding is secured, timescales TBC):

- Documentation package for investment ready proposal as described in 2.3 above.

The contract will be managed by Mull and Iona Community Trust and all outputs described above shall be submitted to Moray Finch, General Manager, as follows:

One hard copy of the final documents and fully editable electronic version including necessary copyright of all the documents. The information gathered and prepared during this commission, including draft and final reports, shall remain the sole property of Mull and Iona Community Trust on behalf of the Mull Archipelago communities.

Form of Tender Submission

Please propose terms of payment for this contract when tendering and confirm availability to start work on the project and attendance at the 16th September 2022 kick-off meeting (to be held online).

All questions regarding this tender to be sent to Moray Finch, General Manager at Mull and Iona Community Trust. Note that all questions and answers will be shared with other bidders.

Submissions should include:

- Name, contact details and background of the lead consultant
- Breakdown of costs for conducting this study, including number of days allocated per task, the day rate, all fees, expenses, charges, meetings, presentations and interviews, including VAT. VAT is only recoverable on Deliverables 2 & 3 and tenderers should therefore provide a total cost with VAT split out under each Deliverable.
- A timetable showing the various milestones including the anticipated dates of submission of draft and final reports.
- The skills and knowledge of the members of the team.
- Examples of similar tasks/studies/projects undertaken recently.
- Two names of contacts from two separate organisations for whom similar work has been undertaken.

Tender Evaluation

Tender submissions will be evaluated on a quality/price basis (70:30) and will include the following:

- (i) Understanding of the brief
- (ii) Methodology and approach
- (iii) Skills and experience of the team
- (iv) Price.

Deadline for Tender Submissions

Please submit by email to Moray Finch, MICT General Manager mfinch@mict.co.uk by 9am on Tuesday 23rd August 2022.