



**INVITATION TO TENDER**

**FOR THE PROCUREMENT OF:**

**Consultancy to develop a strategy for the sustainable future of Scotland's Outdoors Tourism sector**

**Issued: 10th June 2021**

## **CONTENTS**

SECTION 1 : TENDERING INSTRUCTIONS	3
SECTION 2 : INTRODUCTION	7
SECTION 3 : SPECIFICATION & DESCRIPTION OF THE SERVICES REQUIRED	10
SECTION 4: EVALUATION CRITERIA & METHOD STATEMENTS	14
SECTION 5 : PRICING AND PAYMENT SCHEDULE	16
SECTION 6 : FORM OF TENDER & CERTIFICATE OF NON-COLLUSION	17

## **SECTION 1 : TENDERING INSTRUCTIONS**

This invitation to tender is issued by board members and executives of Sail Scotland Ltd and Wild Scotland Ltd, hereafter referred to as 'The Project Group.'

You are invited to submit a proposal for the goods/services described in Section 3 of this Tender. Please read these instructions carefully as failure to provide all the information in the format requested may result in your proposal being considered invalid and it may then be disqualified.

### **Return of tender**

Proposals, which should include only the information requested using the documents detailed in Section 4 – Returned Tender Documentation Checklist, must be submitted to the email address detailed in section 6.

An email confirmation will be sent to confirm successful receipt of your submission. If you do not receive this email, you should contact the submission email address before the deadline.

### **Deadline for Submission of Proposal**

Proposals must be submitted by no later than 9<sup>th</sup> July 2021.

Any proposal received after the time and date stipulated will not be accepted and cannot therefore be considered.

### **Questions Relating to This Tender**

All questions relating to this tender must be submitted in advance of the deadline for queries detailed in the Tender Timetable below.

### **Tender Timetable**

Date of publish	10th June 2021
Deadline for receipt of queries	30th June
Return date and time for proposals	9th July 2021
Anticipated issue date for Award letter and rejection letters to unsuccessful suppliers	23rd July 2021
Anticipated contract start date	2nd August 2021

### **Expenses and / or Losses Associated with the Tender**

The Management Group shall not be responsible for or pay any expenses or losses incurred by any supplier or prospective supplier in the preparation and submission, presentation or clarification of a proposal or any other documentation relating to this requirement.

## **Pricing**

Prices should be submitted in accordance with the requirements of the Pricing Schedule at Section 5. All tendered rates/prices and any payments under a resulting contract shall be in pounds sterling. Tendered rates/prices shall be exclusive of VAT.

It is anticipated the value of this commission will not exceed £30,000 excluding VAT including all expenses accrued within the delivery of the brief.

## **Treatment of Tender**

When we have made a decision on the award of this contract, we will inform you in writing as to whether or not you have been successful and offer feedback to you. We reserve the right not to accept part or all of any tender or to accept any part, or all of any tender or tenders at our discretion. No part of the tender documentation submitted will be returned to the tenderer.

## **Tender Validity**

Your tender shall remain open for acceptance for 90 days from the date for return of tenders indicated above, or any subsequent date notified to you by us. Your tender may be accepted by us at any time during this period.

## **Changes to Tender Procedure**

We reserve the right to change the tender process, including timescales and procedures. We will not accept any liability should we do so.

## **Qualification of Invitation to Tender**

Any qualifications in your tender may be regarded as rendering your submission non-compliant and as such we reserve the right to reject any qualified tender.

## **Conflicts of Interest**

You should advise us as soon as possible if you think you may have a conflict of interest in respect of this tender. If there is a conflict of interest, we reserve the right to disqualify you from further involvement in the tender process.

## **Accuracy of Tender**

You should check the accuracy of your tender prior to submission. A tender containing errors or omissions may, at our discretion, be referred back to you for correction and may be disqualified.

## **Contract Management**

If we award a contract to you, you will be required to cooperate with us in our management of the contract and comply with our contract management requirements.

## **Disclaimer**

We and/or our agents or advisers accept no liability for the accuracy, adequacy or completeness of any of the information provided or any opinions contained in this Invitation to Tender, or of any other information made available during the tender process.

If you submit a tender, you will be deemed to have understood fully the requirements of this Invitation to Tender.

The submission of a tender will imply acceptance of this provision by you. Any attempt to qualify this provision either expressly or implied, may result in your tender being disqualified. Tenderers should raise any concerns with the contract requirements in advance of the tender submission deadline.

## **Financial Standing**

In order to protect the interests of both organisations we may undertake a financial standing check on your organisation and reserve the right not to take your application further should you not meet our requirements for this commission.

## **Bidding with others**

**If applying on behalf of a consortium**, please list the names and addresses of all other members of the consortium within the Supplier Questionnaire. Any contract will be entered into with the nominated lead organisation and all members of the consortium, who will in these circumstances each be required to execute said contract together with all ancillary documentation, evidencing their joint and several liability in respect of the obligations and liabilities of the contract. It will be for members of the consortium to sort out their respective duties and liabilities amongst each other. For administrative purposes, any associated documentation will be sent to the nominated lead organisation.

You should advise us if you are involved in more than one bid for this opportunity.

## Evaluation Process

### Tender Submission Selection & Award Criteria and Methodology

This stage will be assessed using the information provided in your response to the specification below. Your response should fully address each of the selection/evaluation criteria and method statements detailed in section 4.

All award criteria will be scored using the methodology below.

<b>0</b>	<b>Unacceptable</b>	Nil or inadequate response. Fails to demonstrate an ability to meet the requirement.
<b>1</b>	<b>Poor</b>	Response is partially relevant and poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled.
<b>2</b>	<b>Acceptable</b>	Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas.
<b>3</b>	<b>Good</b>	Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled.
<b>4</b>	<b>Excellent</b>	Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full.

## SECTION 2 : INTRODUCTION

### Introduction

Outdoors Scotland is an initiative led by Wild Scotland and Sail Scotland and supported by the Scottish Government to champion a collaborative approach for the sector to drive Scotland forward as the leading and world-renowned place for sustainable, and environmentally focussed marine and outdoor adventure activities with an ambition to grow the sector from £759m to £1bn by 2025.

The Project aims to set in motion the full realisation of the potential resting in the Scottish marine and outdoor adventure tourism markets. The sector is the lifeblood to many rural areas and by its nature is fragmented and diverse in product and business capacities and competencies.

This initial phase will set out the current marketplace, opportunities and ability for the sector to make a major contribution to delivery of market recovery. This to be achieved over a 3-year programme (2022-2025) of partnership working by industry together with our public sector stakeholder partners.

Marine and outdoor adventure activities provide the backdrop to Scotland's experience proposition. The sector is 'on message' to the consumer and 'brand Scotland' and through its very nature takes consumer spend to fragile, rural areas across Scotland.

On message:

- Brand Scotland
- Outdoor health and wellbeing
- Sustainable tourism in the environment
- Supports rural and isolated economies and communities
- Immediately accessible to home markets
- Supports specialist skills
- Internationally recognised

HIE report Adventure Tourism Scotland 2015 concludes.

***Scotland is a world-class destination for outdoor leisure, 'adventure' tourism and wildlife watching. This much is acknowledged by DMO leaders and the international trade body ATTA alike.***

### The outdoor product offering

Scotland is presented as a place of clear and clean nature environments, stunning places and incredible wildlife. A cornerstone within the 'brand promise' is brilliant and unique experiences in the great outdoor natural environment. Along with built heritage our natural asset is one of Scotland's most recognisable images across domestic and international markets.

The outdoor adventure sector will be very able to drive recovery through the delivery of responsible and sustainable tourism activities. An increase in consumer demand has been driven by a new-found love of the outdoors and desire for nature, wildlife and open spaces which has been fuelled by lockdown during the COVID-19 pandemic. The natural environment is at the forefront of minds and growth of responsible and sustainable tourism experiences will be driven by consumer demand. This is a sector that is very able to lead the way in tourism recovery and to ensure Scotland is recognised on the global platform as a World Class Responsible Tourism Destination.

## The Market

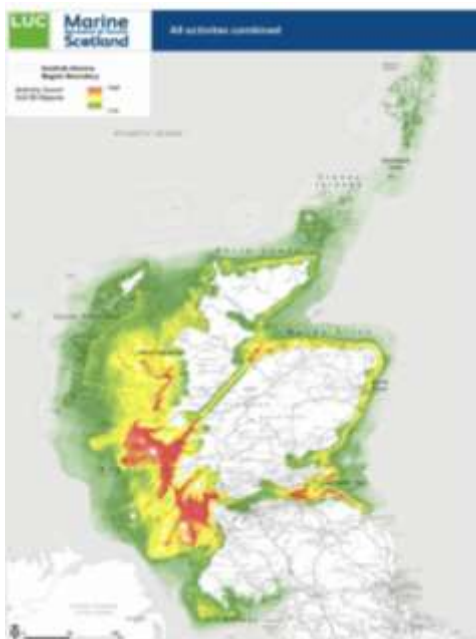
The sector is one of Scotland's fastest growing, with 'activity and adventure' tourism estimated in 2015 to be worth £759m to the Scottish economy ([2015 Adventure Tourism report](#)), with tourist spending on nature based activities accounting for 40% of all tourism spending in Scotland ([NatureScot](#)) and supporting businesses and employment throughout Scotland including in rural and economically fragile areas. The sector delivers tangible benefits to the people of Scotland, reconnecting people with nature, promoting responsible access, health and wellbeing and sustainable economic growth.

Marine Tourism is recognised as a key sector within National Strategies and is shaped by the Awakening the Giant Strategy 2015-2020 and the recently launched Giant Strides Strategy 2020-2025. The value of the sector is scheduled to hit £450m per annum, much of which is in rural locations and through small businesses.

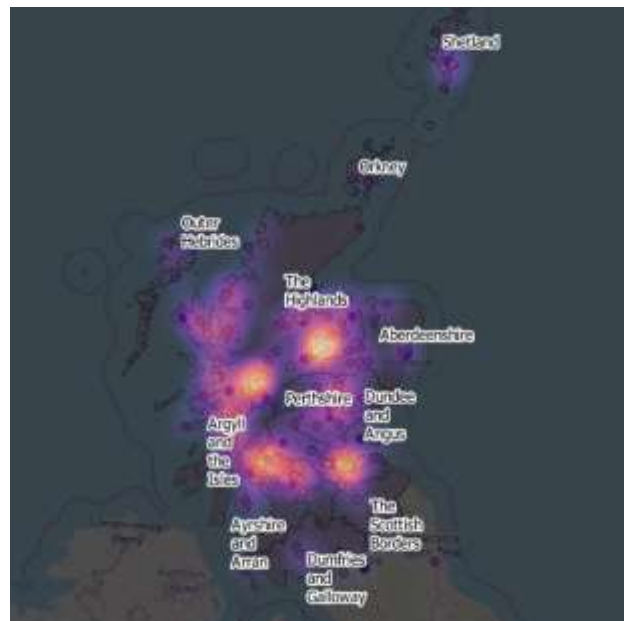
## Where to experience the outdoors

There is no corner of Scotland where outdoor activities do not take place. Across the Borders, central belt, highlands and islands the great outdoors calls visitors to go out and enjoy Scotland. The sector is made up of many micro and enthusiast led businesses through to large international players. Many are based in rural communities and are key local employers. Their business activities bring visitors and lifeblood income to these economies so supporting the health and wealth of communities.

### Marine



### Adventure



## Time to Pull together

The Outdoor sector has a wide range of supporting trade bodies, NGOs and associations. The players and trade bodies are across the board small and independently thinking and led by devotees, evangelists and champions of their activity.



Core revenue funding is coming to an end leaving sector bodies struggling to maintain any sort of presence. The advent of COVID-19 highlighted the advantages of sector specific interaction with businesses and the value of such business networks.

There is an argument for alignment and consolidation of effort and resource and a more integrated approach across the sector. This could provide a highly effective bridge and form strong private and public sector partnerships.

One of the key aspects of what we refer to later in the document as the Foundation Phase is the identification and connection with the wide range of bodies, NGOs and sector groups that make up this diverse and economically powerful sector

### **Organisational Structures**

The project is wholly financed by the Scottish Government and supported by the voluntary input of board members of Sail Scotland and Wild Scotland and their executive staff.

#### **Management Steering Group**

The Management Steering Group serves to oversee the delivery of the project in line with the terms of funding by the Scottish Government and is made up of respective Chairs, board members and executive staff of Sail Scotland and Wild Scotland. The Management Steering Group is accountable for finances, administration and delivery of the project to budget and on time.

#### **Industry Leadership Group (ILG)**

The ILG is drawn from private sector operators, industry leaders and senior managers across public sector bodies. The ILG serves to offer guidance and support to the Consultant and executive staff in the development of the Strategy. Members will be expected to link the direction or the developing Strategy with national strategic Covid-19 recovery planning.

#### **Executive Staff**

The CEO at Sail Scotland and Manager at Wild Scotland are commissioned to support the development work of the plan, liaise with the Consultant and support industry networking and facilitation.

## SECTION 3 : SPECIFICATION & DESCRIPTION OF THE SERVICES REQUIRED

### Purpose

The Management Steering Group is looking to award a contract for the provision of a consultancy to develop a new strategic plan for the Outdoors tourism sector in Scotland.

### Foundation Phase 2021-2022

This phase will bring together the diverse sectors and set in motion to drive the contribution of the sector from £759m to £1bn by 2025. This will engage public and private sectors in a joint-partnership programme and in so doing contribute and align with the STERG recovery plan and successful delivery of Outlook 2030.

The Consultant will lead the debate and discussion across the industry. The role will work closely with the ILG, a group of strategic stakeholders across both private and public sectors.

### Stage 1 Our Place in the market

The stage 1 research exercise is intended to provide a common understanding, based on sound evidence of the opportunities and challenges in further developing the potential of Outdoors Tourism in Scotland

This element requires the review of a range of existing research reports and sources to answer specifically the following questions:

- Markets and trends
  - Which are the most important markets for Scotland as an outdoor tourism destination?
  - What are the specific needs and requirements of these market segments?
  - How are these markets likely to change in the future?
  - Examining these markets, what growth opportunities might they present?
  - What are the barriers and challenges to reaching and influencing these identified markets and capitalising on global trends?
- Product offering
  - How do we best define and categorise 'Outdoor Tourism' in Scotland ensuring all elements across education & skills, health, wellbeing, marine and activity are included?
  - In response to the identified priority markets, what are the strongest tourism offerings within the outdoor tourism supply base in Scotland?
  - How good are these in the eyes of the visitor? What is particularly strong? What are the weaknesses if any?
  - What are the particular aspects of the Scottish outdoor experience which might provide growth in the future? How might such growth impact the wider provision of tourism infrastructure.
  - How might the greater visibility and reputation of marine and outdoor offerings impact on Scotland's attractiveness to both domestic and international markets?
  - How well does the current (and future planned) activity supply base in Scotland meet the needs of its most important markets?
  - What is the international perception and where does Scotland currently sit on the global platform for sustainable outdoor tourism?
  - How is the current provision regarded by domestic markets?
  - How well does the wider business environment support the development of the outdoor tourism offering within Scotland? e.g., transport routes and options, digital infrastructure, access to investment funding
  - Identify how business and community collaboration can be improved within the sector.
  - Identify what is required in the sector to improve the quality of the tourism offering.

- Identify specific challenges relating to skills and workforce in the sector and what action needs to be taken.
- **Industry and the business base**
  - What is the economic contribution of outdoors tourism to Scotland? e.g., visitor spend, number of jobs supported, number of staying visitors;
  - How has this changed over the last five years?
  - What does the outdoors tourism business base look like within Scotland?
  - How has this changed over the last five years?
  - What is the recommended and appropriate sector group/body roles across the sector. To include an assessment and recommendations around future roles, remits, structuring and appropriate resourcing.

We expect Stage 1 to be completed by: 29th October 2021

### **Stage 2, Industry engagement**

The purpose of the wider industry engagement stage is to further test and develop the findings and emerging recommendations from stage 1 research phase and to increase the levels of industry engagement in the process to achieve wider ownership of, and ultimately commitment to, the delivery of a partners' action plan.

It is envisaged that this will take the form of industry workshops where the successful consultant(s) will be required to present the findings of stage 1 and to facilitate a discussion which is intended to achieve two main outcomes:

1. Firstly, to verify and further build key aspects of the stage 1 research, e.g., to gather wider industry views on the key markets and their needs within Scotland and how these are changing, or to capture views on the product offering.
2. Secondly, to gather views on what the required key actions are to realise the potential of Scotland. The facilitator should ensure that emerging recommended actions are influenced by industry and public agencies.

We expect Stage 2 to be completed by: 28th January 2022

### **Stage 3, Strategic Plan**

A Vision and Strategic Plan and will be produced that outlines:

1. The development of an aligned Outdoors Scotland Strategy that will deliver sustainability and growth for the outdoor sector.
2. The ambitions and recommendations must be aligned with the Scottish Tourism Recovery Task Force 5-year Plan and Outlook 2030.
3. The Outdoors Scotland Strategy should provide and influence direction to sector funding, marketing and development plans.
4. Outlining of a strategic alignment of tourism development with sport, health, education and wellbeing.
5. The role of industry leadership and recommended structures to support sector and wider national strategic ambitions for sustainability and growth.

We expect Stage 3 to be completed by: 25th February 2022

## Outputs & Milestones

The Consultant will be expected to liaise with the executive staff and ILG throughout the process. This to enable continual input and support from leading influencers both in the public and private sectors. The following key outputs are required from this piece of work:

### Stage 1

- A presented report which captures the key findings of the stage 1 research, review and consultation exercise which would be agreed with the project team and which could then be progressed for wider industry engagement at stage 2.

### Stage 2

- A research report capturing the findings of stage 1 and stage 2 which can be used as the basis for the preparation of an action plan which will realise the potential of Outdoors Tourism in Scotland. Indicative findings will be shared and considered with the ILG to enable the subsequent development of a strategic plan.

### Stage 3

- An action plan document, front-ended with the strategic context and vision, but which sets out the key actions, interventions and initiatives to achieve the growth ambitions. The final output should show how it aligns with and be seen as a vital element in the delivery of COVID-19 Recovery Plans and the wider ambitions around Outlook 2030 national tourism strategy. This final document will provide the required detailed discussions with senior stakeholders across tourism through to Scottish Government Ministers as to the long-term strategic resourcing, growth and development of the Outdoors Tourism market in Scotland. The final report will be supplied in e format with three printed and bound copies sent to: the Scottish Government Tourism Department, Wild Scotland and Sail Scotland.

During Stages 1-3 The Consultant will be in regular contact with members of the Sail Scotland and Wild Scotland boards, executive staff and the advisory members of ILG.

#### 1. Period of Contract

It is envisaged that the Contract will commence on 2nd August 2021 and be completed by March 2022.

#### 2. Management Information / Reporting requirements

As a minimum, the consultant shall provide a brief report by email on a two-week basis to a nominated contact within the Outdoors Scotland Management Steering Group. The report should detail actions taken in the previous week, and expected timescales for outstanding requirements.

#### 3. Contract Management

The consultant will be required to attend an inception meeting following the award of the contract. A schedule of review meetings will be agreed at that meeting. Following this, a meeting will be held with the ILG.

Further meetings may be scheduled at the request of the Outdoors Scotland Management Steering Group.

#### 4. Invoicing procedures

Invoices should be sent to [info@wild-scotland.co.uk](mailto:info@wild-scotland.co.uk) Standard payment terms are 30 days from receipt of invoice.

## 5. **Additional information**

The contents of the specification and consultant outputs shall be the property of the Scottish Government and shall not be shared with or given to any other organisation other than Wild Scotland or Sail Scotland without the permission of The Scottish Government.

#### SECTION 4: EVALUATION CRITERIA & METHOD STATEMENTS

All tender submissions from suppliers will be assessed on both price and quality. The contract will be awarded to the supplier who is seen to deliver the best submission in terms of understanding of the outdoor sector and value for money.

Please provide the information requested in each of the following Method Statements:

##### **METHOD STATEMENT 1 : Compliance to Specification**

Please provide details of other relevant consultancy contracts you have carried out previously, for private or public bodies, and how this experience will help you to deliver this contract based on the specification outlined in Section 3 above. Please include case studies, the value of the contract(s) and the duration of the contract(s).

Particular reference should be made to:

- Any previous specification work that has been carried out in relation to tourism development
- Lessons learned from previous experience
- Demonstrate knowledge of the outdoor tourism sector

Please limit your response to 3 A4 pages

##### **METHOD STATEMENT 2 : Project Plan**

Please provide a project plan and work schedule which includes:

- A breakdown of how you will meet the project requirements, as detailed in Section 3 above.
- A breakdown of how you will approach the implementation of the contract and how key objectives will be met.
- Workplan by team member detailing the study project and key milestones including projected delivery timetables of stage 1,2 and 3 above.

Please limit your response to 4 A4 pages

##### **METHOD STATEMENT 3 : Project Team**

Please Identify key member(s) of your project team, and their role(s) and responsibility within the team structure as applied to this project.

Please support your response with CVs / case studies, detailing previous experience, and including the value and scope of previous projects.

Please limit your response to 4 A4 pages

##### **METHOD STATEMENT 4 : Contract Management**

Please provide details on how you will manage the Contract, including but not limited to:

- a) Contract review meetings
- b) Contract monitoring and administration
- d) How you will work with the ILG to manage the contract and ensure delivery to specification and agreed service levels

Please limit your response to 2 A4 pages

<b>METHOD STATEMENT 5 : Innovation</b>
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Whilst we have a specification, we welcome any suggestions on innovation. If suppliers wish to propose alternative methods for the delivery of this service that will help achieve better value for money and/or will potentially reduce costs over the term of the contract, they should do so in this Method Statement. Any proposal demonstrating innovation in terms of the services offered and/or the method of service delivery will be fully considered and evaluated.
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Please limit your response to 2 A4 pages
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**SECTION 5 : PRICING AND PAYMENT SCHEDULE**

Suppliers are asked to provide a breakdown of costs for certain items of work in relation to this project. Suppliers should note that only the total value provided by each bidder for the pricing schedule below will be used in the pricing assessment. Suppliers should provide one pricing schedule only.

Those quoting are required to complete the following proforma showing all of the costs associated with their quote. Any additional costs will not be considered.		
Pricing Element (A day rate is based on a 7-hour working day.)	Total No. hours/ element	Price (excl VAT)
Stage 1 Research and our place in the market	Day Rate – No. of Days- Cost -	
Stage 2 Industry engagement	Day Rate – No. of Days- Cost -	
Industry workshops and facilitation	Day Rate – No. of Days- Cost -	
Management Group meetings	Day Rate – No. of Days- Cost -	
Stage 3 Preparation and presentation of proposed draft document and final submission	Day Rate – No. of Days- Cost -	
Any additional costs (e.g. meetings, travel and subsistence– provide a detailed breakdown below)	Cost	
Total		£

Nb: All pricing must be in sterling and exclusive of vat

Payments will be made to the successful consultants as follows:

- On commissioning 15%
- On successful completion of Stage 1 25%
- On successful completion of Stage 2 35%
- On successful completion of Stage 3 25%



**SECTION 6 : FORM OF TENDER & CERTIFICATE OF NON-COLLUSION**

**Tender for the provision of Consultancy to develop a strategy for the sustainable future of Scotland's Outdoors Tourism sector**

To: Sail Scotland and Wild Scotland Management Steering Group

Having carefully examined and considered the tender including but not limited to the Instructions to Suppliers, Description & Specification of Services Required, Supplier Questionnaire, Method Statements and Terms & Conditions of Contract; and in consideration of you considering the proposal:

1. I / We offer and are able to provide the services in accordance with this tender document at the pricing and rates contained in the Pricing Schedule and other documents as are contained or incorporated herein.
2. I / We agree that this proposal shall constitute an irrevocable, unconditional offer that may not be withdrawn for a period of 90 calendar days from the closing date for submission of this proposal.
3. I / We certify that this is a bona fide proposal, intended to be competitive and that I / we have not (either personally or by anyone acting on my / our behalf):
  - 3.1 Fixed the amount of the proposal (or the rate or prices tendered) by agreement with any person.
  - 3.2 Communicated to anyone other than Management Steering Group the amount or approximate amount or terms of my / our proposed proposal (other than in confidence in order to obtain proposals, professional advice or insurance necessary for the preparation of the proposal).
  - 3.3 Entered into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount or terms of any proposal to be submitted by him.
  - 3.4 Canvassed or solicited any member, officer or other employee of Management Steering Group in connection with the award of this proposal.
  - 3.5 Offered, given or agreed to give any inducement or reward in respect of this proposal.
4. I / We understand and accept that the Management Steering Group is not bound to accept any proposal it receives.

Name:

Signature

Role in organisation:

Date:

Return this declaration and your full tender submission by 9th July 2021 to: [info@wild-scotland.co.uk](mailto:info@wild-scotland.co.uk)