



CLINTON DEVON ESTATES

Heaths to Sea – Landscape Recovery of the lower Otter valley

Development of the Blended Finance Plan and the Business Model

Tendering exercise: Information Pack and Tender Specification

July 2025

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Reference	Business Model delivery
Indicative budget	Up to £20,000 plus VAT
Tender issued	Tuesday 22 July 2025
Tender deadline	Sunday 17 August 2025
Anticipated award date	Friday 5 September
Period of contract	September 2025 to March 2026
To support the development of the Blended Finance Plan and Business Model for the Heaths to Sea Landscape Recovery Project and provide support to identify and engage with potential funders and private finance options.	

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Project Background

The *Heaths to Sea Landscape Recovery* initiative holds nature recovery ambitions of national significance. Located in East Devon's lower River Otter catchment and funded by one of the government's environmental land management schemes, this project represents one of the most exciting nature enhancement opportunities in the UK with the focus including river/floodplain restoration and woodland creation.

The scheme spans more than 4,500 hectares of the East Devon countryside and will power nature recovery across the agricultural hinterlands linking three parts of the Pebblebed Heaths National Nature Reserve (NNR). Our vision is for this diverse landscape to be nature rich and ecologically healthy whilst also supporting food production, net zero, timber and access needs.

The Project Development Phase (PDP) will involve outlining how the target catchment area currently supports wildlife, access, food and timber production and how benefits can be increased for nature, climate, and local people in the project area. A key focus of the work is river and floodplain restoration of the River Otter south of Newton Poppleford and including the Back, Colaton and Budleigh brooks. Our intent is that by the end of the two-year project development phase, the project will deliver a costed restoration plan and fundable proposition for implementation.

The project is led by Clinton Devon Estates (the Estate), who are also the primary land owner, working in partnership with our own inhouse farm team, the Pebblebed Heaths Conservation Trust, four private landowners and 15 tenant farmers.

Landscape Recovery of one of the UK Government's new '[Environmental Land Management](#)' schemes (ELMs), which aims to incentivise farmers and land managers to provide environmental and climate goods and services alongside food production. There are three ELM schemes: Sustainable Farming Incentive (SFI), Countryside Stewardship (CS) and Landscape Recovery. While SFI and CS support action at farm level, Landscape Recovery presents a generationally significant opportunity for landowners and managers to take a more radical and large-scale approach to producing environmental and climate goods on their land.

Landscape Recovery offers competitive funding for large-scale projects (500ha+), typically involving a partnership of land managers working together, to develop plans for ambitious, long-term restoration over 20+ years.

Project Development Phase

The Heaths to Sea project is one of 34 pilot projects in round 2 of Defra's Landscape Recovery scheme. The project started its 2-year project development phase (PDP) in April 2024. During the Development Phase, the project is undertaking detailed planning

and feasibility studies to turn its vision for landscape-scale restoration into detailed plans. The project must produce six key deliverables by December 2025:

- Project Management and Governance Plan
- Monitoring and Evaluation Plan
- Land Management Plan
- Stakeholder Engagement Plan
- Site Access Plan
- **Blended Finance Plan and Business Model**

Upon successful completion of the Development Phase, the project will have the opportunity to apply to Defra to advance to a 20+ year Project Implementation Phase. The project will only progress through to Implementation upon successful negotiation and agreement of project details with Defra and subject to agreement from participating landowners and tenants.

It is anticipated that there will be a request to Defra for a proportion of the costs of delivery of the Landscape Recovery Project as well as identifying and securing private sources of funding.

Submission of the deliverables in December 2025 will be followed by an approximately 3-6 month negotiation process with Defra, known as ‘assurance’, to finalise the deliverables and negotiate an implementation agreement. Upon successful completion of assurance, which we hope will conclude by mid-April 2026 (but may extend into June 2026), the project hopes to progress to a 20-30 year Project Implementation Phase, subject to successful negotiation and agreement of project details with Defra.

2025		2026	
Jul-Sep	Oct-Dec	Jan-Mar	April onwards
Development of GF prospectus and business model, and identification of private funding opportunities			
	Engagement with potential funders		
	Submit LR plans		
		Assurance	
			Implementation →

The green finance consultant appointed will be expected to work with the Estate through the remainder of the Project Development Phase to support the development of the Blended Finance Plan and Business Model for the Heaths to Sea Landscape Recovery Project and provide support to identify and engage with potential funders and private finance options.

If you are interested in tendering for this work, please contact Kirstie.Ellis@clintondevon.com to express an interest and we will share further information regarding the project including the Defra LR Handbook.

Scope of works

To support the development of our Blended Finance Plan and the Business Model, and to develop and write a significant part of both documents, we require consultants with a breadth of experience including, but not limited to, rural business development, general business planning, financial forecasting, green finance (as defined by the Green Finance Institute), ESG/CSR funding and government subsidy payments.

As part of our Landscape Recovery Project Development Phase **we have already completed or are currently working on** a number of baselining tasks and activities that will support the development of the green finance plan and business model. These include:

- a BNG assessment of current habitats and predicted uplift of habitat area and /or quality as a result of landscape change
- an audit of potential market demand for BNG locally
- soil and above ground carbon assessment
- an economic feasibility study of the potential for woodland creation
- land management and funding plans for each farm based on existing SFI/CS options and payment rates
- a tourism and diversification feasibility study
- development of a baseline Natural Capital Account and predicted uplift from project activities

We do not anticipate any repeat of these activities, but consultants will be expected to review and utilise the information already collated in the development of a prospectus and blended finance plan for the landscape recovery project. We anticipate the following activities being completed by the consultant selected, but would also want to hear from you what additional activities you feel should be covered.

- Initial scoping meeting and monthly review meetings to discuss emerging information and progress
- Review proposed landscape change plans and work completed so far on baselining and the developing a natural capital account
- Review of proposed plans against existing SFI/CS options for realistic costing and to ensure suggested payment rates and other income cover the real costs of loss of farm income
- Financial modelling of potential for BNG / carbon income as well as potential water quality or water storage potential, using existing reports and calculations, and provide recommendations that also highlight business risk
- Review of other potential options for funding, including infrastructure investment, philanthropic funding, sponsorship, private finance and business income, and provide a longlist of potential funders with recommendations on

approach and priority, with shortlist of the top five thought to have the best goodness of fit

- Development of a prospectus / investment case for the Heaths to Sea landscape recovery project planned activities, outcomes and monitoring to present those plans and develop a narrative around the benefits to potential funders
- Initial engagement with potential private finance and funding opportunities and advocate on behalf of the project, including making a direct approach to the top five identified funders / sponsors
- Draft a blended finance plan and business model for the Heaths to Sea project following the guidance of the Defra LR handbook, bring all the above information together and considering:
 - Budget projection for a 20-30 year period, including a consideration of potential new streams of funding to come online during that period as nature finance markets evolve
 - Advice on the appropriate legal structures and governance for managing blended finance
 - Due diligence processes for sources of private funding
 - Options for blending and stacking or bundling payments for activities
 - Risk Assessment of finance options

Outputs:

- Blended finance plan and business model for the Heaths to Sea LR Project, including inflation linked budgets for the next 20-30 years
- Funding prospectus for the Heaths to Sea Landscape Recovery Project
- Longlist of potential sponsors and funding opportunities with meetings held with an engagement approach made to the top 5 best opportunities.

Timeline: September to December 2025 (with support to engage with potential funders to continue to March 2026)

Tender Process

Please submit your tender document to the Project Manager, Heaths to Sea, Clinton Devon Estates. All tender applications should be sent by email to

Kirstie.Ellis@ClintonDevon.com

Please quote for the work as defined by the contract scope above and taking account of the details in the project description. Within the tender please:

- 1) Provide a breakdown of delivery costs against the items within the brief.
- 2) Describe your background or experience of undertaking similar work.
- 3) Describe your approach and methodology to the work
- 4) Indicate a rough timeline for your work (with regard to the phasing timeline outlined).

In particular, we are looking for consultants who can demonstrate experience in one or more of the following areas:

- 1) Experience of working with landscape-scale, multi-landowner nature recovery projects, particularly other Landscape Recovery projects (round 1 or 2)
- 2) Experience of brokering natural capital and green finance deals (e.g. Biodiversity Net Gain, carbon credits, nutrient neutrality, CSR) and /or developing revenue streams from climate resilience and adaptation activities.
- 3) Experience of working with landowners, farmers, and other rural stakeholders
- 4) Experience of working with government bodies such as Defra, the Environment Agency, and Natural England
- 5) Knowledge and expertise in all of the specific areas of advice included within this tender specification.

If you are already working with Landscape Recovery projects, we would expect that alongside any templates Defra may provide, you will have developed materials and templates that could potentially be re-purposed. Whilst we appreciate both existing client confidentiality and IP, please articulate what you may be able to offer to speed up our work together in this area and provide added value.

Tenders will be judged on quality of submission, experience of contractors and value for money. We will not necessarily choose the cheapest tender. However, we must be able to justify choosing a more expensive contractor and demonstrate that the quoted cost is reasonable. In particular we will be looking at how your tender covers the following:

1. Technical capability and experience, including experience of similar work
2. Methodology and approach
3. Cost and value for money
4. Innovation and added value
5. Risks and mitigations

Deadline for applications: Sunday 17 August. The successful contractor should be able to start work from early September 2025.

Tenders will be reviewed, with a view to announcing the successful tender Friday 5 September.

For any questions about the role and project, please contact

Kirstie.Ellis@ClintonDevon.com

Please note: As the body providing funding for this project, the DEFRA / Environment Agency will expect to review procurement processes, and as such a copy of the tenders received will be made available to their grant team prior to award.

Payment schedule and terms

Term payments to be negotiated with the successful contractor before the start of the contract, and to be paid on submission of invoices. Normal terms are 30 days after invoicing.

Invoices should reference the 'Heaths to Sea Landscape Recovery Project and be addressed to: **Colaton Raleigh Trust**, Clinton Devon Estates, Rolle Estate Office, Bickton Arena, East Budleigh, Budleigh Salterton, Devon EX9 7BL

Terms and Conditions

The basis of the contractual agreement between Clinton Devon Estates (The Estate) and the successful contractor is outlined in our standard terms and conditions below. In applying for this work, you are explicitly agreeing to be bound by these terms and conditions for the duration of the contract. If you require any alterations to these terms and conditions, please state your issues within your tender documents.

1. The contractor shall provide the services with that degree of diligence, prudence and foresight which would reasonably and ordinarily be expected from a skilled and experienced person engaged in a type of undertaking similar to that of the contractor; and in such a manner as to minimise disruption to the business of the Estate. The contractor shall comply with all Regulations in its provision of the Services.
2. The contractor shall undertake the services to meet all standard and appropriate codes of practice, health and safety advice as issued by the Health and Safety Executive
3. The contractor shall undertake and be responsible for all necessary risk assessments to complete the contract and shall confirm with the Estate's authorising officer that this has been undertaken.
4. The contractor and the Estate will comply at all times with their respective obligations under Data Protection Legislation (Data Protection Legislation means (i) the UK GDPR as amended from time to time; (ii) the DPA 2018 as amended from time to time; (iii) Regulations made under the DPA 2018; and (iv) all applicable Law relating to the Processing of Personal Data).
5. The contractor shall be responsible for the supply of all equipment necessary to undertake the contract.
6. The contractors shall have in place current public liability insurance to the value of not less than £5m, and professional indemnity insurance with a minimum liability of £5million per claim, and shall make available a copy of the renewal certificate(s) for such policies to the Heaths to Sea Project Manager and the Estates Insurance Manager.
7. The contractor shall keep in strict confidence all technical or commercial know-how, specifications, inventions, processes or initiatives which are of a confidential nature and have been disclosed to the contractor by the Estate or its agents and any other confidential information concerning the Estate's business or its products which the contractor may obtain. The contractor shall not use such confidential information for any purpose other than fulfilling its obligations under this

agreement and shall restrict disclosure of such confidential material to such of its employees, agents or sub-contractors as need to know the same for the purpose of discharging the contractor's obligations to the Estate and shall ensure that such employees, agents or sub-contractors are subject to these same obligations of confidentiality.

8. Unless otherwise agreed in writing, all Intellectual Property Rights in and to the outputs of the services are hereby assigned with full title guarantee (including by way of a present assignment of future copyright and/or unregistered design right) by the contractor and shall vest in the Estate. The contractor shall (at the request of the Estate, but at the contractor's cost and expense) do all such acts and things (including executing all documents) required to vest such Intellectual Property Rights in the Estate.
9. The contractor warrants that the materials, all deliverables and outputs of and the use of the services by the Estate shall not infringe any Intellectual Property Rights of any third party. The contractor shall keep the Estate indemnified against any and all liabilities, losses, damages, injury, costs, claims and expenses (including reasonable legal expenses) awarded against or incurred or paid by the Estate arising out of or in connection with any breach by the Contractor of this condition.
10. The contractor shall carry out the provision of the services in accordance with the Estate grant Authority's environmental requirements, which are:
 - a. To conserve energy, water, wood, paper and other resources, reduce waste and phase out the use of ozone depleting substances and minimise the release of greenhouse gases, volatile organic compounds and other substances damaging to health and the environment.
 - b. Where relevant, to pay due regard to the use of recycled products, so long as they are not detrimental to the provision of the Project or the environment, to include the use of all packaging, which should be capable of recovery for re-use or recycling.
 - c. Where relevant, take all possible precautions to ensure that any equipment and materials used in the provision of the Project do not contain chlorofluorocarbons, halons or any other damaging substances, unless unavoidable, in which case the Estate shall be notified in advance of their use.
 - d. Endeavour to reduce fuel emissions wherever possible.
11. The Payment Schedule will be agreed with the contractor, and the Estate reserves the right to hold a retention to be paid on completion of the contract, the extent of which and the release date shall be specified on awarding the contract.
12. The work shall be undertaken in accordance with the contract scope outlined in tender documents and in the Contractors tender document.

Our organisation

Clinton Devon Estates is a family business involved in farming, sustainable forestry, conservation management and several other land-based enterprises (<https://clintondevon.com/>).

We are stewards of the Devon countryside and are active across all areas of land management. This includes the management of the core area of the Pebblebed Heaths National Nature Reserve (<https://www.pebblebedheathsnnr.co.uk/>) which also includes the Otter Estuary. These internationally important conservation sites are managed by the Estate's own conservation charity (www.pebblebedheaths.org.uk/about-us/) and we work in close strategic partnerships with the Devon Wildlife Trust, the RSPB, the National Trust, East Devon District Council and Devon County Council. Working in collaboration with the Environment Agency, in 2023 the Estate completed the lower Otter restoration project, an ambitious nature recovery and coastal climate adaptation scheme (<https://www.pacco-interreg.com/>).

The Estate has been the recipient of many awards and accolades including achieving the Queen's Award for Enterprise three times and we have been honoured several times in the Sunday Times Best Small Companies To Work For. We are proud of our conservation credentials and can demonstrate an excellent track record for delivering nature improvement at scale.

Clinton Devon Estates is committed to creating an inclusive work environment with a diverse workforce. All appropriately qualified candidates and suppliers will receive consideration without regard to race, religion, gender, sexual orientation, national origin, disability or age.