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Tender

Consultancy to provide Strategic Investment Model (SIM) Management Services

Crown Estate Scotland

F02: Contract notice

Notice identifier: 2023/S 000-002243

Procurement identifier (OCID): ocds-h6vhtk-039a63

Published 25 January 2023, 9:45am

Section I: Contracting authority

I.1) Name and addresses

Crown Estate Scotland

Quartermile Two, 2nd Floor, 2 Lister Square

Edinburgh

EH3 9GL

Contact

Maurice McTeague

Email

maurice.mcteague@crownestatescotland.com

Telephone

+44 1314607657

Country

United Kingdom

NUTS code

UK - United Kingdom

Internet address(es)

Main address

<http://crownestatescotland.com/>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA29444

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.publiccontractsscotland.gov.uk/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publiccontractsscotland.gov.uk/>

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://www.publiccontractsscotland.gov.uk/>

I.4) Type of the contracting authority

Other type

Public Corporation

I.5) Main activity

Other activity

Property

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Consultancy to provide Strategic Investment Model (SIM) Management Services

Reference number

CES-ITT-2023-01-24

II.1.2) Main CPV code

- 73220000 - Development consultancy services

II.1.3) Type of contract

Services

II.1.4) Short description

Crown Estate Scotland, on behalf of SOWEC, is seeking to appoint a consultancy to provide a number of management and other associated services (SIM Management Service Provider) to the SIM for an initial period of 12 months. During the first 6 months, the SIM Management Service Provider will be contracted to Crown Estate Scotland (CES) who is procuring this on behalf of the group pending the new legal entity (SIM legal vehicle) being created. Once the SIM legal vehicle has been established, it is intended that the contract with CES will be novated to the new SIM legal vehicle and will continue for the remainder of its term.

If the SIM Management Service Provider has demonstrated sufficient value during this initial contract period, the expectation is that the contract will be extended for a further 12 months. The decision to extend will be solely at the discretion of the SIM legal vehicle or, if such has not yet been established, Crown Estate Scotland

II.1.5) Estimated total value

Value excluding VAT: £350,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 79421000 - Project-management services other than for construction work
- 79100000 - Legal services
- 79211000 - Accounting services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Management of the SIM is likely to be required longer term and beyond the periods described above. It will be for the SIM legal vehicle or the CFWG at that time to determine the appropriate arrangements for the services required once this appointment has expired.

The primary function of the SIM Management Service Provider will be to present investment opportunities on strategic projects for consideration to the CFWG, through the to be established, legal structure of the SIM (Deliverable 1). This will be drawn from information received and requested to enable an initial assessment to be made; and further detail then collated which allows potential investors to make informed decisions about progressing funding opportunities. Governance and reporting is to be established for the SIM, through to the CFWG and SOWEC.

The identification of major capital-intensive projects and progressing those identified are the immediate priorities of SIM Stage 1. It is expected that sources of strategic investment will need to be identified and factored into proposals from mid-2023 to maximise the economic value of future offshore wind farms in Scotland and further afield. As CFWG members have been working towards these dates for some time, there are already concepts and proposals

in development. The SIM Management Service Provider will be responsible, by Summer 2023, for facilitating the compilation of these proposals, to be agreed by the CFWG. This then represents an initial collective view on the major Scottish port and infrastructure projects which are to be prioritised for strategic offshore wind investment (Deliverable 2).

This initial view can evolve and be reactive to additional opportunities or refocus. Supplementary data in support of the initial recommendations will be requested, collated, and presented. The aim shall be, by end 2023, to have a robust and comprehensive definition of initial major projects to be pursued, with investment prospectuses concluded and transitioned to stage 2. (Deliverable 3).

For its first year, as noted, the SIM legal vehicle will focus on major port infrastructure projects. However, the intention is to expand SIM activities into other areas such as supply chain, people & skills and innovation. By the end of 2023, the SIM Management Service Provider, with the CFWG, shall have developed a view on what those areas should be together with a comprehensive justification in support of it (Deliverable 4).

Bidders are asked to submit proposals setting out their suggested approach for delivering this scope of work in full. Bidders must explain how they would address all other requirements for the delivery of the commission, including any potential legal/regulatory issues. Further information on how to respond to this tender is set out in the ITT.

II.2.5) Award criteria

Quality criterion - Name: Exhibit an understanding of the purpose and aims of the SIM and off the offshore wind market / Weighting: 10

Quality criterion - Name: Proposed approach – to delivery of the scope and management of the project / Weighting: 20

Quality criterion - Name: Experience – including involvement in relevant projects and staff knowledge / Weighting: 30

Quality criterion - Name: Differentiation – the special insights and capabilities which distinguish you from the rest of the market / Weighting: 10

Price - Weighting: 30

II.2.6) Estimated value

Value excluding VAT: £350,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing

system

Duration in months

12

This contract is subject to renewal

Yes

Description of renewals

Renewals and extension options are detailed in the ITT

II.2.10) Information about variants

Variants will be accepted: Yes

II.2.11) Information about options

Options: Yes

Description of options

Options for additional purchases are detailed in the ITT

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

Different professional activities required to deliver the services will require enrolment on

appropriate professional or trade registers as described in the SPD module.

III.1.2) Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3) Technical and professional ability

List and brief description of selection criteria

Commercial Law LLM (including ability to practice in Scotland) and registration with appropriate professional body required to support the creation and governance of the SIM legal vehicle. Chartered Financial Analyst (CFA) accreditation required to manage investment proposals. PRINCE2 Practitioner (or equivalent) for management of the project as a whole.

Minimum level(s) of standards possibly required

See above

III.2) Conditions related to the contract

III.2.1) Information about a particular profession

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

Commercial Law LLM (including ability to practice in Scotland) and registration with appropriate professional body required to support the creation and governance of the SIM legal vehicle. Chartered Financial Analyst (CFA) accreditation required to manage investment proposals. PRINCE2 Practitioner (or equivalent) for management of the project as a whole.

III.2.2) Contract performance conditions

Refer to ITT

III.2.3) Information about staff responsible for the performance of the contract

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

14 March 2023

Local time

12:00pm

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 6 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

14 March 2023

Local time

12:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: Recurrence will be dependant on performance and options to extend which may be exercised

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.3) Additional information

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=720220.

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx.

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(SC Ref:720220)

Download the ESPD document here:

https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=720220

VI.4) Procedures for review

VI.4.1) Review body

Edinburgh Sheriff Court

Sheriff Court House, 27 Chambers Street

Edinburgh

EH1 1LB

Telephone

+44 1312252525

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/edinburgh-sheriff-court-and-justice-of-the-peace-court>