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Tender

Growth Investment Support Services Framework

Scottish Enterprise

F02: Contract notice

Notice identifier: 2024/S 000-008235

Procurement identifier (OCID): ocds-h6vhtk-02fe46

Published 14 March 2024, 3:41pm

The closing date and time has been changed to:

24 April 2024, 11:00am

See the [change notice](#).

Section I: Contracting authority

I.1) Name and addresses

Scottish Enterprise

21 Russell Crescent

Bathgate

EH48 2GN

Contact

Joanne Napier

Email

joanne.napier@scotent.co.uk

Telephone

+44 1414685600

Country

United Kingdom

NUTS code

UKM82 - Glasgow City

Internet address(es)

Main address

<http://www.scottish-enterprise.com/>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00398

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

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

www.publiccontractsscotland.gov.uk

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

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

www.publiccontractsscotland.gov.uk

I.4) Type of the contracting authority

Regional or local Agency/Office

I.5) Main activity

Economic and financial affairs

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Growth Investment Support Services Framework

Reference number

P24-0099

II.1.2) Main CPV code

- 79412000 - Financial management consultancy services

II.1.3) Type of contract

Services

II.1.4) Short description

The purpose of this ITT is to appoint an anticipated number of up to 4 suppliers over 2 Lots to deliver periodic expert support a range of different investment management, accounting, and corporate finance interventions as detailed in the Scope of Services section in the Invitation To Tender.

II.1.5) Estimated total value

Value excluding VAT: £1,000,000

II.1.6) Information about lots

This contract is divided into lots: Yes

Tenders may be submitted for all lots

II.2) Description

II.2.1) Title

Bespoke Investments

Lot No

1

II.2.2) Additional CPV code(s)

- 79400000 - Business and management consultancy and related services
- 79412000 - Financial management consultancy services
- 66122000 - Corporate finance and venture capital services
- 66171000 - Financial consultancy services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

The Growth Investments (GI) team has a periodic requirement for expert and specialist expertise on specific projects to supplement and complement the team in the delivery of time-critical activities across all areas of the business. Successful delivery of GI's objectives relies upon considerable market knowledge and expertise, and the support services framework will ensure that the GI team has immediate access to specialist expertise as and when required.

The work covered under the framework will cover a range of different investment management, accounting, and corporate finance interventions across all areas of GI.

Lot 1 will be a single supplier Lot which will cover the more complex instructions which would typically be of a value around GBP50k and above where the deal is outwith our equity funds and where SE is a co-lead or sole investor.

II.2.5) Award criteria

Quality criterion - Name: Prompt Payment / Weighting: Pass/Fail

Quality criterion - Name: Roles and responsibilities of project team, including capacity to deliver / Weighting: 25

Quality criterion - Name: Investment market knowledge / Weighting: 20

Quality criterion - Name: Understanding of project requirements and methodology, including tools and techniques, that will be used when providing the service / Weighting: 20

Quality criterion - Name: Knowledge of Scotland's growth sectors and of working with SMEs / Weighting: 15

Quality criterion - Name: Information Security (ACP Level 2) / Weighting: 10

Quality criterion - Name: Business Continuity / Weighting: 5

Quality criterion - Name: Fair Work First / Weighting: 5

Price - Weighting: 40

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

This framework will be for an initial period of 36 months with the option to extend for a further 12 months if required

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

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

II.2.14) Additional information

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015.

II.2) Description

II.2.1) Title

Core Funding Investments

Lot No

2

II.2.2) Additional CPV code(s)

- 66171000 - Financial consultancy services
- 66122000 - Corporate finance and venture capital services
- 79400000 - Business and management consultancy and related services
- 79412000 - Financial management consultancy services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

The Growth Investments (GI) team has a periodic requirement for expert and specialist expertise on specific projects to supplement and complement the team in the delivery of time-critical activities across all areas of the business. Successful delivery of GI's objectives relies upon considerable market knowledge and expertise, and the support services framework will ensure that the GI team has immediate access to specialist expertise as and when required.

The work covered under the framework will cover a range of different investment

management, accounting, and corporate finance interventions across all areas of GI.

Lot 2 will be appointed to up to 3 suppliers Lot which will cover the lower value, more frequent pieces of work.

II.2.5) Award criteria

Quality criterion - Name: Prompt Payment / Weighting: Pass/Fail

Quality criterion - Name: Roles and responsibilities of project team, including capacity to deliver / Weighting: 25

Quality criterion - Name: Investment market knowledge / Weighting: 20

Quality criterion - Name: Understanding of project requirements and methodology, including tools and techniques, that will be used when providing the service / Weighting: 20

Quality criterion - Name: Knowledge of Scotland's growth sectors and of working with SMEs / Weighting: 15

Quality criterion - Name: Information Security (ACP Level 2) / Weighting: 10

Quality criterion - Name: Business Continuity / Weighting: 5

Quality criterion - Name: Fair Work First / Weighting: 5

Price - Weighting: 40

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

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Options: No

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

II.2.14) Additional information

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015.

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

The relevant selection criteria will be included in the SPD Scotland module.

III.1.2) Economic and financial standing

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland module.

III.1.3) Technical and professional ability

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland module.

III.2) Conditions related to the contract

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.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 4

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.2.1) Previous publication concerning this procedure

Notice number: [2021/S 000-030415](#)

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

Originally published as:

Date

18 April 2024

Local time

11:00am

Changed to:

Date

24 April 2024

Local time

11:00am

See the [change notice](#).

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

English

IV.2.7) Conditions for opening of tenders

Date

18 April 2024

Local time

11:00am

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

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

SPD Statement for 2A.17 – Form of Participation (Notably as part of a group, consortium, joint venture or similar).

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.

SPD Statement for 2C.1 - Where the main bidder relies on the capacities of other entities in order to meet the selection criteria, the bidder must provide a separate SPD response setting out the information required under SPD (Scotland): Part II (sections A and B); Part III exclusion grounds; the relevant part of Section IV selection criteria; and Part V (if applicable) for each of the entities concerned.

SPD Statement for 2D.1.2 – If the bidder proposes to subcontract any part(s) of the service and those sub-contractors are not relied upon, they should arrange for a separate SPD response from each potential subcontractor. The subcontractors must complete the relevant parts of the SPD (Scotland) (Sections A and B of Part II and Part III only) to self-declare whether there are grounds for their exclusion. [This may be requested at the selection stage or prior to the subcontractor commencing work on the contract.]

This is a relevant climate change contract, bidders are required to complete and return the attached Climate Change Plan template.

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=759863.

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:759863)

Download the ESPD document here:

https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=759863

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court and Justice of the Peace Court

Sheriff Clerk's Office, PO Box 23, 1 Carlton Place,

Glasgow

G5 9DA

Telephone

+44 1414298888

Country

United Kingdom

Internet address

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

VI.4.2) Body responsible for mediation procedures

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

In the first instance, contact the Head of Facilities Management and Procurement at Scottish Enterprise, with any concerns or enquiries. Email: <https://www.scottish-enterprise.com/help/contact-us>.

An economic operator that suffers, or risks suffering, loss or damage attributable to a breach of duty under the Public Contracts (Scotland) Regulations 2015, may bring proceedings that will be started in the High Court.

VI.4.4) Service from which information about the review procedure may be obtained

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>