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Tender

## **Fund Advisory Services for Ambition North Wales Clean Energy Fund**

Ambition North Wales

F02: Contract notice

Notice identifier: 2023/S 000-018263

Procurement identifier (OCID): ocids-h6vhtk-03dcd5

Published 27 June 2023, 2:38pm

The closing date and time has been changed to:

**8 September 2023, 3:00pm**

See the [change notice](#).

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Ambition North Wales

Government Buildings, Sarn Mynach,

Llandudno Junction

LL31 9RZ

#### **Contact**

Mrs Sara Jones

#### **Email**

[sarajones@uchelgaigogledd.cymru](mailto:sarajones@uchelgaigogledd.cymru)

**Telephone**

+44 7765652510

**Country**

United Kingdom

**NUTS code**

UKL12 - Gwynedd

**Internet address(es)**

Main address

<https://ambitionnorth.wales/>

Buyer's address

[https://www.sell2wales.gov.wales/search/Search\\_AuthProfile.aspx?ID=AA0361](https://www.sell2wales.gov.wales/search/Search_AuthProfile.aspx?ID=AA0361)

**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

<https://www.sell2wales.gov.wales/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.sell2wales.gov.wales/>

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.sell2wales.gov.wales/>

#### **I.4) Type of the contracting authority**

Regional or local authority

#### **I.5) Main activity**

General public services

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Fund Advisory Services for Ambition North Wales Clean Energy Fund

Reference number

SLEF - FSA - ER01

#### **II.1.2) Main CPV code**

- 73000000 - Research and development services and related consultancy services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

Ambition North Wales (ANW) is seeking to procure a Fund Advisor for two distinct stages of work. The first stage will involve assisting ANW with preparation for launch and will include input in the following key areas:

Market intelligence input into the Investment Strategy and associated priorities to support finalisation of this Strategy;

Developing a marketing strategy and a launch plan;

Input into the ANW fund management plan, which can be defined as: a document which sets out the operational procedures for the Fund for it to be established, managed effectively, and deliver against the objectives for the Fund. It will provide an overview of the key activities of the Fund over the medium term, covering the set up and then ongoing operation and management of the Fund;

Scoping the support required to enable an online application process channelled through ANW website; and

Scoping any legal input or other external advisory support required for launch of the fund.

The second stage will provide advisory support to operate the fund during the deployment period and it is envisaged this will be over a minimum 5-year contract period. The advisor will be responsible for sourcing investments, undertaking due diligence, developing

investment business cases, and recommending investments for approval and then providing regular progress and monitoring reports on the performance of investments and the portfolio of the Fund.

It should be noted that the investment strategy is a live document that has built-in flexibility to change throughout the life of the fund in response to changing market demand and conditions.

#### **II.1.5) Estimated total value**

Value excluding VAT: £810,000

#### **II.1.6) Information about lots**

This contract is divided into lots: No

### **II.2) Description**

#### **II.2.2) Additional CPV code(s)**

- 73000000 - Research and development services and related consultancy services
- 73200000 - Research and development consultancy services
- 73210000 - Research consultancy services
- 73220000 - Development consultancy services
- 73300000 - Design and execution of research and development

#### **II.2.3) Place of performance**

NUTS codes

- UKL11 - Isle of Anglesey
- UKL12 - Gwynedd
- UKL13 - Conwy and Denbighshire
- UKL23 - Flintshire and Wrexham

Main site or place of performance

Across North Wales

#### **II.2.4) Description of the procurement**

Open Tender

**II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

**II.2.6) Estimated value**

Value excluding VAT: £810,000

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

Duration in months

60

This contract is subject to renewal

Yes

Description of renewals

Potential for 2 year extension

**II.2.10) Information about variants**

Variants will be accepted: Yes

**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

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## **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

Experience, skills, and any additional role requirements:

Expertise and demonstrable experience in developing and mobilising investment strategies and funds similar to the fund proposed by Ambition North Wales (similar in terms of funding products and funding recipients).

Expertise and demonstrable experience in operating and managing funds similar to the Fund proposed by Ambition North Wales (similar in terms of funding products and funding recipients).

Expertise and demonstrable experience in leveraging additional funding and investment from a range of public/private sources.

Expertise and demonstrable experience in promoting and marketing funds similar to the Fund proposed by Ambition North Wales.

Expertise and demonstrable experience in undertaking financial and technical due diligence of funding applications.

Expertise and demonstrable experience in monitoring performance at investment and portfolio level against key Fund spending objectives and targeted benefits.

An understanding of renewable energy technologies and other clean energy solutions relevant to current UK and Welsh Government Energy and infrastructure strategies.

Previous experience of working with Devolved Administrations, Growth Deals, City Deals, Local Enterprise Partnerships, Local Authorities or Combined Authorities.

Qualified and experienced team with effective interpersonal and communication skills.

#### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

#### **III.1.3) Technical and professional ability**

Selection criteria as stated in the procurement documents

### **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

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## **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: No

### **IV.2) Administrative information**

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

Originally published as:

Date

28 July 2023

Local time

3:00pm

Changed to:

Date

8 September 2023

Local time

3:00pm



See the [change notice](#).

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

English, Welsh

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

Tender must be valid until: 22 December 2023

#### **IV.2.7) Conditions for opening of tenders**

Date

28 July 2023

Local time

3:30pm

Place

Ambition North Wales

Information about authorised persons and opening procedure

Lead Officers

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.2) Information about electronic workflows**

Electronic invoicing will be accepted

### **VI.3) Additional information**

NOTE: To register your interest in this notice and obtain any additional information please visit the Sell2Wales Web Site at

[https://www.sell2wales.gov.wales/Search/Search\\_Switch.aspx?ID=132574](https://www.sell2wales.gov.wales/Search/Search_Switch.aspx?ID=132574).

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.sell2wales.gov.wales/sitehelp/help\\_guides.aspx](https://www.sell2wales.gov.wales/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.

(WA Ref:132574)

The buyer considers that this contract is suitable for consortia.

## **VI.4) Procedures for review**

### **VI.4.1) Review body**

High Court

Royal Courts of Justice, The Strand

London

WC2A 2LL

Telephone

+44 2079477501

Country

United Kingdom