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Tender

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

Ambition North Wales

F02: Contract notice

Notice identifier: 2024/S 000-027202

Procurement identifier (OCID): ocids-h6vhtk-0493ef

Published 26 August 2024, 12:57pm

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

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

Ambition North Wales

Ambition North Wales

Llandudno Junction

LL31 9RZ

#### **Contact**

Sara Jones

#### **Email**

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

#### **Telephone**

+44 1248672323

#### **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/>

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

Regional or local authority

**I.5) Main activity**

Other activity

Growth Deal

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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 – ER02-2024

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

- 66170000 - Financial consultancy, financial transaction processing and clearing-house services

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

Services

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

We are seeking suitably qualified and experienced Fund Advisor Services for our Clean Energy Fund. Our 2025 Clean Energy Fund will aim to support initiatives across North Wales which: - help achieve renewable energy and decarbonisation targets - have an element of local ownership The Fund will also help unlock private and community investment in new energy projects

#### **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**

Third Sector Fund Advisor services

Lot No

1

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

- 66170000 - Financial consultancy, financial transaction processing and clearing-house services
- 73000000 - Research and development services and related consultancy services
- 71314000 - Energy and related services
- 71314200 - Energy-management services
- 71314300 - Energy-efficiency consultancy services

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

NUTS codes

- UKL11 - Isle of Anglesey

Main site or place of performance

North Wales

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

Ambition North Wales is seeking to procure a competent and experienced Fund Advisor(s)\* for the Third Sector and Private Sector sub-funds. The tender consists of two separate lots for the provision of the Fund Advisor services for the two sub-funds, as per:

-Lot 1: Third Sector Fund Advisor services

-Lot 2: Private Sector Fund Advisor services

As such, bids will be received for Lot 1 and Lot 2 separately. If a bidder is bidding for both the Third Sector and Private Sector sub-fund Fund Advisor services, they will need to submit separate responses to the required technical and commercial questions for lots 1 and 2.

The Fund Advisor services for Lot 1 and Lot 2 both comprise the following two distinct stages of work:

-Stage 1: The first stage will involve supporting the development of the investment strategy for the sub-fund and assisting with preparation for launch.

-Stage 2: The second stage will focus on advisory support to operate the sub-fund during the deployment period.

Progression to stage 2 of the contract is dependent on:

- 3.1.1. performance in stage 1 of the contract, and
- 3.1.2. Economic Ambition Board's approval of the Fund Investment Strategy, Fund Management Plan and Fund Communication and Engagement Strategy that will form part of Ambition North Wales' Full Business Case submission.

#### **II.2.5) Award criteria**

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

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

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

possible extension of two years

#### **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) Description**

#### **II.2.1) Title**

Private Sector Fund Advisor services

Lot No

2

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

- 73000000 - Research and development services and related consultancy services
- 66170000 - Financial consultancy, financial transaction processing and clearing-house services
- 71314300 - Energy-efficiency consultancy services
- 71314200 - Energy-management services
- 71314000 - Energy and related services
- 65400000 - Other sources of energy supplies and distribution

**II.2.3) Place of performance**

NUTS codes

- UKL - Wales

Main site or place of performance

North Wales

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

Ambition North Wales is seeking to procure a competent and experienced Fund Advisor(s)\* for the Third Sector and Private Sector sub-funds. The tender consists of two separate lots for the provision of the Fund Advisor services for the two sub-funds, as per:

-Lot 1: Third Sector Fund Advisor services

-Lot 2: Private Sector Fund Advisor services

As such, bids will be received for Lot 1 and Lot 2 separately. If a bidder is bidding for both the Third Sector and Private Sector sub-fund Fund Advisor services, they will need to submit separate responses to the required technical and commercial questions for lots 1 and 2.

The Fund Advisor services for Lot 1 and Lot 2 both comprise the following two distinct stages of work:

-Stage 1: The first stage will involve supporting the development of the investment strategy for the sub-fund and assisting with preparation for launch.

-Stage 2: The second stage will focus on advisory support to operate the sub-fund during the deployment period.

Progression to stage 2 of the contract is dependent on:

- 3.1.1. performance in stage 1 of the contract, and
- 3.1.2. Economic Ambition Board's approval of the Fund Investment Strategy, Fund Management Plan and Fund Communication and Engagement Strategy that will form part of Ambition North Wales' Full Business Case submission.

#### **II.2.5) Award criteria**

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

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Possible extension of two years

#### **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

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **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.2.2) Contract performance conditions**

See documents for details

#### **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: Yes

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

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

Date

30 September 2024

Local time

10:00am

#### **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**

Duration in months: 3 (from the date stated for receipt of tender)

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

Date

30 September 2024

Local time

10:00am

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## **Section VI. Complementary information**

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

This is a recurrent procurement: No

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

Please see documents for further details

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=144060](https://www.sell2wales.gov.wales/Search/Search_Switch.aspx?ID=144060).

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:144060)

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