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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): ocds-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@uchelgaisgogledd.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

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

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

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

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

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

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.

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.

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