

**Appointment of a Fund Manager to manage the South East Sustainability Loan Fund**

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E-mail: ojs@publications.europa.eu Info & on-line forms: <http://simap.europa.eu>**CONTRACT NOTICE****SECTION I: CONTRACTING AUTHORITY****I.1) NAME, ADDRESSES AND CONTACT POINT(S)****Official name:** [Finance South East Ltd](#)**Postal address:** [Riverside House, 4 Meadows Business Park, Station Approach, Blackwater](#)Town: [Camberley](#)Postal code: [GU17 9AB](#)Country: [United Kingdom](#)**Contact point(s):** [Finance South East Ltd \(but please refer to Cyril Sweett in contacts below\)](#) Telephone: [01276 608510](#)For the attention of: [Ms S Goodsell](#)Email: [sally.goodsell@financesoutheast.com](mailto:sally.goodsell@financesoutheast.com)

Fax:

**Internet address(es) (if applicable)**General address of the contracting authority (URL): [www.financesoutheast.com](http://www.financesoutheast.com)

Address of the buyer profile (URL):

**Further information can be obtained at:**

- As in above-mentioned contact point(s)  
 Other: please complete Annex A.I

**Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained at:**

- As in above-mentioned contact point(s)  
 Other: please complete Annex A.II

**Tenders or requests to participate must be sent to:**

- As in above-mentioned contact point(s)  
 Other: please complete Annex A.III

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**I.2) TYPE OF THE CONTRACTING AUTHORITY AND MAIN ACTIVITY OR ACTIVITIES**

- |  |   |
|--|---|
| <input type="radio"/> Ministry or any other national or federal authority, including their regional or local sub-divisions | <input type="radio"/> General public services                   |
| <input type="radio"/> National or federal agency/office  | <input type="radio"/> Defence                                   |
| <input type="radio"/> Regional or local authority  | <input type="radio"/> Public order and safety                   |
| <input type="radio"/> Regional or local agency/office  | <input type="radio"/> Environment                               |
| <input checked="" type="radio"/> Body governed by public law   | <input checked="" type="radio"/> Economic and financial affairs |
| <input type="radio"/> European institution/agency or international organisation  | <input type="radio"/> Health                                    |
| <input type="radio"/> Other ( <i>please specify</i> ):   | <input type="radio"/> Housing and community amenities           |
|  | <input type="radio"/> Social protection                         |
|  | <input type="radio"/> Recreation, culture and religion          |
|  | <input type="radio"/> Education                                 |
|  | <input type="radio"/> Other ( <i>please specify</i> ):          |

The contracting authority is purchasing on behalf of other contracting authorities:

- yes  no

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### SECTION II: OBJECT OF THE CONTRACT

#### II.1) DESCRIPTION

##### II.1.1) Title attributed to the contract by the contracting authority

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##### II.1.2) Type of contract and location of works, place of delivery or of performance

(Choose one category only - works, supplies or services - which corresponds most to the specific object of your contract or purchase(s))

<input type="radio"/> <b>(a) Works</b> <input type="radio"/> Execution <input type="radio"/> Design and execution <input type="radio"/> Realisation, by whatever means of work, corresponding to the requirements specified by the contracting authorities	<input type="radio"/> <b>(b) Supplies</b> <input type="radio"/> Purchase <input type="radio"/> Lease <input type="radio"/> Rental <input type="radio"/> Hire purchase <input type="radio"/> A combination of these	<input checked="" type="radio"/> <b>(c) Services</b> Service category No <b>6</b> <i>(For service categories 1-27, please see Annex II of Directive 2004/18/EC)</i>
Main site or location of works	Main place of delivery	Main place of performance South East England NUTS code <b>UKJ</b>

##### II.1.3) The notice involves

- A public contract  
 The establishment of a framework agreement  
 The setting up of a dynamic purchasing system (DPS)

##### II.1.4) Information on framework agreement (if applicable)

<input type="radio"/> Framework agreement with several operators Number <i>OR, if applicable, maximum number of participants to the framework agreement envisaged</i>	<input type="radio"/> Framework agreement with a single operator
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##### Duration of the framework agreement:

Duration in year(s): \_\_\_\_\_ or month(s): \_\_\_\_\_

Justification for a framework agreement, the duration of which exceeds four years:

<b>Estimated total value of purchases for the entire duration of the framework agreement (if applicable; give figures only):</b>	
Estimated value excluding VAT:	Currency:
<i>OR</i> Range: between _____ and _____	Currency:
Frequency and value of the contracts to be awarded: <i>(if known)</i> :	

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**II.1.5) Short description of the contract or purchase(s)**

Finanace South East Ltd wishes to appoint a Fund Manager for a 10 year arrangement commencing in March 2010 (subject to the Public Contracts Regulations 2006 and Public Contracts (Amendment) Regulations 2009. The SE Sustainability Loan Fund will be a 'side-car' fund, whose purpose is to provide additional and/or match funding to qualifying businesses funded through existing publicly funded schemes, including the SEEDA sponsored Funding Escalator, managed by FSE. The Fund will provide loans from £20,000 to £200,000 on the same terms as the primary loan. The objective of the SE Sustainability Loan Fund is to accelerate development and improve competitiveness of micro, small and medium sized businesses in the South East Region that themselves are delivering activities that help to reduce the region's ecological footprint.

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### II.1.6) Common procurement vocabulary (CPV)

	Main vocabulary	Supplementary vocabulary (if applicable)
Main object	66190000	

### II.1.7) Contract covered by the Government Procurement Agreement (GPA)

yes  no

### II.1.8) Division into lots (for information about lots, use Annex B as many times as there are lots)

yes  no

If yes, tenders should be submitted for (tick one box only)

- one lot only  
 one or more lots  
 all lots

### II.1.9) Variants will be accepted

yes  no

## II.2) QUANTITY OR SCOPE OF THE CONTRACT

### II.2.1) Total quantity or scope (including all lots and options, if applicable)

One business acting as a Fund Manager is required to manage the South East Sustainability Loan Fund for a 10 year period. Details of the specific requirements will be set out on tender documents.

<i>If applicable</i> , estimated value excluding VAT (give figures only):		Currency:
OR Range: between 120000.00	and 150000.00	Currency: GBP

### II.2.2) Options (if applicable)

yes  no

If yes, description of these options:

<i>If known</i> , provisional timetable for recourse to these options:		
in months:	or days:	(from the award of the contract)
Number of possible renewals (if any):		or Range: between and
<i>If known</i> , in the case of renewable supplies or service contracts, estimated timeframe for subsequent contracts:		
in months:	or days:	(from the award of the contract)

## II.3) DURATION OF THE CONTRACT OR TIME-LIMIT FOR COMPLETION

Duration in months:	or days:	(from the award of the contract)
OR Starting	11/03/2010 (dd/mm/yyyy)	
Completion	10/03/2020 (dd/mm/yyyy)	

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### SECTION III: LEGAL, ECONOMIC, FINANCIAL AND TECHNICAL INFORMATION

#### III.1) CONDITIONS RELATING TO THE CONTRACT

##### III.1.1) Deposits and guarantees required (if applicable)

A performance bond or guarantee may be required. Further information will be provided in the Pre-Qualification and Tender Documents.

##### III.1.2) Main financing conditions and payment arrangements and/or reference to the relevant provisions regulating them

All payment arrangements will be set out in tender documents.

##### III.1.3) Legal form to be taken by the group of economic operators to whom the contract is to be awarded (if applicable)

No legal form is required. If the operator is a joint venture or consortium, the Contracting Authority requires members to accept joint and several liability. Further information will be provided in the tender documents.

##### III.1.4) Other particular conditions to which the performance of the contract is subject (if applicable)

yes  no

If **yes**, description of particular conditions

#### III.2) CONDITIONS FOR PARTICIPATION

##### III.2.1) Personal situation of economic operators, including requirements relating to enrolment on professional or trade registers

Information and formalities necessary for evaluating if requirements are met:

Please refer to Prequalification documents.

##### III.2.2) Economic and financial capacity

Information and formalities necessary for evaluating if requirements are met:

Please refer to Prequalification documents.

Minimum level(s) of standards possibly required (if applicable):

Please refer to Prequalification documents.

##### III.2.3) Technical capacity

Information and formalities necessary for evaluating if requirements are met:

Please refer to Prequalification documents.

Minimum level(s) of standards possibly required (if applicable):

Please refer to Prequalification documents.

##### III.2.4) Reserved contracts (if applicable)

yes  no

The contract is restricted to sheltered workshops

The execution of the contract is restricted to the framework of sheltered employment programmes

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**III.3) CONDITIONS SPECIFIC TO SERVICES CONTRACTS****III.3.1) Execution of the service is reserved to a particular profession**

yes  no

**If yes**,reference to the relevant law, regulation or administrative provision:

The Fund Manager should be experienced in SME finance and regulated by the FSA. they should be able to demonstrate experience in delivering innovative solutions in finance.

**III.3.2) Legal entities should indicate the names and professional qualifications of the staff responsible for the execution of the service**

yes  no

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### SECTION IV: PROCEDURE

#### IV.1) TYPE OF PROCEDURE

##### IV.1.1) Type of procedure

<input type="radio"/> Open	
<input type="radio"/> Restricted	
<input checked="" type="radio"/> Accelerated restricted	Justification for the choice of accelerated procedure:
<input type="radio"/> Negotiated	Candidates have already been selected <input type="radio"/> yes <input type="radio"/> no  <b>If yes, provide names and addresses of economic operators already selected under Section VI.3)</b> <i>Additional information</i>
<input type="radio"/> Accelerated negotiated	Justification for the choice of accelerated procedure:
<input type="radio"/> Competitive dialogue	

##### IV.1.2) Limitations on the number of operators who will be invited to tender or to participate (*restricted and negotiated procedures, competitive dialogue*)

Envisaged number of operators 1
OR Envisaged minimum number                      and , if applicable, maximum number
Objective criteria for choosing the limited number of candidates:

##### IV.1.3) Reduction of the number of operators during the negotiation or dialogue (*negotiated procedure, competitive dialogue*)

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated

yes  no

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### IV.2) AWARD CRITERIA

#### IV.2.1) Award criteria (please tick the relevant box(es))

Lowest price

OR

The most economically advantageous tender in terms of

the criteria stated below (the award criteria should be given with their weighting or in descending order of importance where weighting is not possible for demonstrable reasons)

the criteria stated in the specifications, in the invitation to tender or to negotiate or in the descriptive document

Criteria	Weighting	Criteria	Weighting
1.		6.	
2.		7.	
3.		8.	
4.		9.	
5.		10.	

#### IV.2.2) An electronic auction will be used

yes  no

If yes, additional information about electronic auction (if appropriate)

### IV.3) ADMINISTRATIVE INFORMATION

#### IV.3.1) File reference number attributed by the contracting authority (if applicable)

[CS/TN/BV260110 FSE Fund](#)

#### IV.3.2) Previous publication(s) concerning the same contract

yes  no

If yes,

<input type="radio"/> Prior information notice	<input type="radio"/> Notice on a buyer profile
Notice number in OJ:	of (dd/mm/yyyy)
<input type="radio"/> Other previous publications (if applicable)	

#### IV.3.3) Conditions for obtaining specifications and additional documents (except for a DPS) or descriptive document (in the case of a competitive dialogue)

Time limit for receipt of requests for documents or for accessing documents	
Date: <a href="#">04/02/2010</a> (dd/mm/yyyy)	Time: <a href="#">17:00</a>
Payable documents	
<input type="radio"/> yes <input checked="" type="radio"/> no	
If yes, price (give figures only):	Currency:
Terms and method of payment:	

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### IV.3.4) Time-limit for receipt of tenders or requests to participate

Date: 05/02/2010 (dd/mm/yyyy) Time: 14:00

### IV.3.5) Date of dispatch of invitations to tender or to participate to selected candidates (if known) (in the case of restricted and negotiated procedures, and competitive dialogue)

Date: (dd/mm/yyyy)

### IV.3.6) Language(s) in which tenders or requests to participate may be drawn up

ES CS DA DE ET EL EN FR IT LV LT HU MT NL PL PT SK SL FI SV

Other:

### IV.3.7) Minimum time frame during which the tenderer must maintain the tender (open procedure)

Until: (dd/mm/yyyy)

OR Duration in month(s):

OR days: (from the date stated for receipt of tender)

### IV.3.8) Conditions for opening tenders

Date: (dd/mm/yyyy) Time:

Place (if applicable):

Persons authorised to be present at the opening of tenders (if applicable)

yes  no

**Appointment of a Fund Manager to manage the South East Sustainability Loan Fund****SECTION VI: COMPLEMENTARY INFORMATION****VI.1) THIS IS A RECURRENT PROCUREMENT** *(if applicable)*

yes  no

If **yes**, estimated timing for further notices to be published:

**VI.2) CONTRACT RELATED TO A PROJECT AND/OR PROGRAMME FINANCED BY EU FUNDS**

yes  no

If **yes**, reference to project(s) and/or programme(s): 1. FSE has been appointed as Fund Operator for the SE Sustainability Loan Fund, a new regional loan fund that has been provided through the ERDF Programmes of Convergence and Competitiveness via the South East England Development Agency (SEEDA).

**VI.3) ADDITIONAL INFORMATION** *(if applicable)***VI.4) PROCEDURES FOR APPEAL****VI.4.1) Body responsible for appeal procedures**

Official name: High Court of England and Wales  
Postal address: The Strand  
Town: London Postal code: WC2A 2LL  
Country: United Kingdom Telephone: 0207 947 6000  
Email: Fax:  
Internet address (URL):

**Body responsible for mediation procedures** *(if applicable)*

Official name: High Court of England and Wales  
Postal address: The Strand  
Town: London Postal code: WC2A 2LL  
Country: United Kingdom Telephone: 0207 947 6000  
Email: Fax:  
Internet address (URL):

**VI.4.2) Lodging of appeals** *(please fill heading VI.4.2 OR if need be, heading VI.4.3)*

Precise information on deadline(s) for lodging appeals:

In accordance with Regulation 32 (Information about contract award procedures) of the Public Contracts Regulations 2006 (as amended), the contracting authority will incorporate a minimum 10 calendar day standstill period at the point information on the award of the contract is communicated to tenderers. This period allows unsuccessful tenderers to seek further debriefing from the contracting authority before the contract is entered into. Further, without prejudice to the right for aggrieved parties who have been harmed or are at risk of harm by a breach of the rules to take action in the High Court (England, Wales and Northern Ireland), in accordance with Regulation 47 (Enforcement of obligations), aggrieved parties may appeal an award decision by writing to Cyril Sweett, at the address specified in section VI.4.3 below.

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**VI.4.3) Service from which information about the lodging of appeals may be obtained**

Official name: [Office of Government and Commerce](#)  
Postal address: [Roseberry Court](#)  
[St Andrews Business Park](#)  
Town: [Norwich](#) Postal code: [NR7 0HS](#)  
Country: [United Kingdom](#) Telephone: [08450004999](#)  
Email: Fax:  
Internet address (URL):

**VI.5) DATE OF DISPATCH OF THIS NOTICE:**

[26/01/2010](#) (dd/mm/yyyy)

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**ANNEX A****ADDITIONAL ADDRESSES AND CONTACT POINTS****I) ADDRESSES AND CONTACT POINTS FROM WHICH FURTHER INFORMATION CAN BE OBTAINED**

Official name: [Cyril Sweett Ltd](#)  
Postal address: [60 Grays Inn Road](#)  
Town: [London](#) Postal code: [WC1X 8AQ](#)  
Country: [United Kingdom](#)  
**Contact point(s):** [Cyril Sweett Ltd](#) Telephone: [07747 611 885](#)  
For the attention of: [Tony Newberry](#)  
Email: [tony.newberry@cyrilsweett.com](mailto:tony.newberry@cyrilsweett.com) Fax:  
Internet address (URL): [www.cyrilsweett.com](http://www.cyrilsweett.com)

**II) ADDRESSES AND CONTACT POINTS FROM WHICH SPECIFICATIONS AND ADDITIONAL DOCUMENTS (INCLUDING DOCUMENTS FOR COMPETITIVE DIALOGUE AS WELL AS A DYNAMIC PURCHASING SYSTEM) CAN BE OBTAINED**

Official name: [Cyril Sweett Ltd](#)  
Postal address: [60 Grays Inn Road](#)  
Town: [London](#) Postal code: [WC1X 8AQ](#)  
Country: [United Kingdom](#)  
**Contact point(s):** [Procurement](#) Telephone: [07747 611 885](#)  
For the attention of: [Tony Newberry](#)  
Email: [tony.newberry@cyrilsweett.com](mailto:tony.newberry@cyrilsweett.com) Fax:  
Internet address (URL): [www.cyrilsweett.com](http://www.cyrilsweett.com)

**III) ADDRESSES AND CONTACT POINTS TO WHICH TENDERS/REQUESTS TO PARTICIPATE MUST BE SENT**

Official name: [Cyril Sweett Ltd](#)  
Postal address: [60 Grays Inn Road](#)  
Town: [London](#) Postal code: [WC1X 8AQ](#)  
Country: [United Kingdom](#)  
**Contact point(s):** Telephone: [07747 611 885](#)  
For the attention of: [Tony Newberry](#)  
Email: [tony.newberry@cyrilsweett.com](mailto:tony.newberry@cyrilsweett.com) Fax:  
Internet address (URL): [www.cyrilsweett.com](http://www.cyrilsweett.com)

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### ANNEX B (1)

#### INFORMATION ABOUT LOTS

#### LOT NO TITLE

#### 1) SHORT DESCRIPTION

#### 2) COMMON PROCUREMENT VOCABULARY (CPV)

#### 3) QUANTITY OR SCOPE

<i>If applicable, estimated value excluding VAT (give figures only):</i>	Currency:
OR Range: between                      and	Currency:

#### 4) INDICATION ABOUT DIFFERENT DATE FOR DURATION OF CONTRACT OR STARTING/COMPLETION

*(if applicable)*

Duration in months:	or days:	(from the award of the contract)
OR Starting	(dd/mm/yyyy)	
Completion	(dd/mm/yyyy)	

#### 5) ADDITIONAL INFORMATION ABOUT LOTS