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UK Government

Wedi ei ariannu gan
Llywodraeth y DU

Heritage, Tourism and Culture Fund 2026 – 2027

Guidance Notes

Please note this document is available in Welsh.



Introduction

The Tourism, Heritage and Culture fund has been established to support sustainable economic growth by accelerating investment in high-quality tourism, heritage and cultural assets. Funded jointly by the UK and Welsh Governments, the scheme aims to strengthen the resilience, productivity and long-term growth of the sector.

The UK Government and Welsh Government have allocated funding until March 2027.

Aim of the Fund

The aim of the fund is to support the creation, expansion or modernisation of tourism, culture or heritage assets which can support regional growth.

The £1 million capital fund will invest in projects across Carmarthenshire that:

- Improve the quality and accessibility of culture, heritage and tourism facilities
- Enhance the overall visitor experience
- Attract increased visitor numbers
- Extend the tourism season

Applications must meet at least one of the fund's objectives.

Levels of grant

Financial support will be made available via a third-party grant scheme to deliver capital projects.

The grant threshold is between £25,000 - £100,000:

- The maximum grant available for capital projects - £100,000
- Match funding is not required; eligible project costs can be funded up to 100%.

Please note match funding will form part of the assessment criteria. Applicants who include match funding will score more highly, as this strengthens value for money and overall impact within the Local Growth Fund programme.

Eligible Organisations

The fund is available to new or existing organisations who are located in or planning to locate within Carmarthenshire. Eligible Organisations:

- Constituted Voluntary and Community Groups
- Public Bodies
- Registered Charities
- Not for profit organisations
- Social Enterprises
- Local branches of national third sector organisations can apply using the parent body's Constitution.
- Town and Community Councils can apply for projects that are additional to normal statutory responsibilities which will benefit the community.

Ineligible Organisations

- Private individuals
- Private businesses
- Project activity delivered solely for the benefit of people outside Carmarthenshire

Eligible project activity

Please note that all projects seeking funding under the Heritage, Tourism and Culture Fund must be delivered by March 31st 2027 at the very latest.

The following examples illustrate the types of projects that may be eligible. Please note that this is not an exhaustive list:

- Facility enhancements aimed at improving the overall visitor experience
- Restoration, enhancement or activation of heritage assets
- Development of tourism infrastructure or trails
- Facility improvements that extend the season
- Improvements to digital accessibility for heritage, tourism or culture facilities
- Interpretation and engagement improvements
- Accessible visitor infrastructure at key sites

Eligible projects costs:

- Capital expenditure - this means the purchase, construction, or enhancement of an asset. This would include:
 - construction costs
 - plant and machinery; and
 - fixtures, fittings and equipment
- Professional services - project development, architect and quantity surveyor fees where directly linked to the capital project
- Items purchased with credit cards are eligible. Applicants will need to provide a copy of the credit card statement as part of the claims process.
- Where an organisation is not VAT registered, these costs will be eligible as part of the grant. Where VAT is recoverable this will be deemed ineligible.

***Please complete and submit the financial profile template provided.**

Ineligible project costs:

- Operational /organisational costs
- Work where materials or design are not appropriate within the guidelines of the fund.
- Expenditure incurred prior to the Offer Letter cannot be considered; this also includes where contracts have been signed or orders placed.
- Insurance.
- Routine repairs and maintenance costs/equipment.
- Religious activities (although funding proposals from religious organisations are welcome).
- Items purchased through lease purchase, hire purchase, extended credit agreements/finance leases will not be considered for grant funding.
- Grant may not be offered or paid if the organisation or applicant is in arrears with any payment to any of the participating local authority operating the scheme.

Programme Outputs and Outcomes:

Each project must identify which of the following outputs and outcomes will be achieved as a result of the funding. Definitions can be found in Annex A.

Outputs

- Number of amenities or facilities created or improved
- Number of people reached
- Match funding leveraged

Outcomes

- Increased visitor numbers
- Number of full-time (FTE) jobs safeguarded

Application Process

Applications will be invited through an open call. Applicants will be invited to submit applications by the following deadline:

- June 17th 2026 at midday

Applications received after this time will not be accepted.

If you are thinking for applying we would be grateful if you could inform the Bureau via Bureau@carmarthenshire.gov.uk

All submissions must be made via the Bureau@carmarthenshire.gov.uk by the specified deadline. Electronic signatures will be accepted.

It is anticipated that funding decisions will be confirmed by mid August 2026.

Eligibility criteria

The applicant must be a third sector or public sector organisation.
Each project must clearly support one or more of the fund's objectives.
Demonstrates how the cross cutting themes will be addressed.
Projects must be deliverable by March 31st 2027.

Scoring criteria

Applications will be assessed and prioritised in line with the following criteria:

- Can demonstrate a clearly identified and articulated need and demonstrate alignment with one or more of the fund's objectives.
- Deliverability (the project must be deliverable by March 31st 2027)
- Value for Money
- Sustainability beyond the life of the grant
- Cash match funding secured
- Demonstrates regional impact

Assessment scoring can be found in Annex B.

All applications will be considered by a Funding Panel which will include representation from Carmarthenshire County Council and the Carmarthenshire Regeneration Partnership.

Recommendations will be taken through Carmarthenshire County Council's decision-making protocols for final decision.

Cross Cutting Themes

All activities will be required to demonstrate how they will meet the following cross cutting themes:

Sustainable and low carbon approaches to delivery

Carmarthenshire County Council has committed to becoming net zero carbon by 2030 and is keen to promote sustainable business practices through its funding programmes. As part of the application, you will be asked how your organisation demonstrates a commitment to sustainable development, some areas to consider below:

- To procure goods and services from local suppliers
- Using public transport and promoting active travel
- Recycle, reuse and repurpose
- Consider using energy renewable sources
- Implementing energy efficiency measures e.g., LED light bulbs
- Going paperless where possible
- Promote green practices through public engagement
- Actively reduce energy consumption

Environment (Wales) Act 2016

Carmarthenshire County Council has a duty under Section 6 of the Environment (Wales) Act 2016 to seek to maintain and enhance biodiversity and promote the resilience of ecosystems when carrying out its functions, including the award of grant funding.

Applicants are therefore required to consider the environmental impact of their project and demonstrate how potential harm to biodiversity will be avoided or minimised. Where appropriate, projects should also identify opportunities to deliver positive environmental outcomes, such as pollinator-friendly planting, protection of existing habitats, sustainable drainage, or nature-based solutions.

The level of detail expected should be proportionate to the scale and nature of the project. Projects that have no impact on the natural environment should explain this briefly.

Welsh Language

[The Welsh Language Standards Compliance Notice](#) places a statutory requirement on the Council to ensure that the grants it awards have a positive effect on opportunities for persons to use Welsh, and on not treating Welsh less favourably than English.

To meet these requirements you must make every effort to do the following:

- Operate bilingually publicly, giving Welsh a high visual presence and status at every opportunity (promotional materials, posts, press releases)
- Communicate bilingually with the public (emails, press releases, phone call letters)
- Collaborate with partners who promote the Welsh language (Mentrau Iaith, Urdd, Young Farmers, Meithrin, Cymraeg i Blant, Welsh medium Schools, Welsh for Adults, chapels, choirs, local newspapers, forums and networks that promote the Welsh language)
- Ensure that there is a workforce with Welsh language skills, or other arrangements in place, that will enable activity in accordance with the Standards.
- Provide services in person or online in Welsh
- Demonstrate consideration of the linguistic nature of the geographical area in which it is intended to serve, and of how the work is going to have a positive impact on the number of speakers or the use of Welsh*

*This means that the applicant has a knowledge of the communities of Welsh speakers who may be affected by the provision; positively or negatively. The applicant will need to be aware of opportunities to increase the visibility of the Welsh language and promote everyone's use of Welsh; confident speakers as well as those who can speak only a little Welsh.

Further guidance can be seen in **Annex C**.

Digital accessible services

Outlined below are potential actions for organisations to consider when developing and delivering their projects:

- Publicising your project digitally: in addition to traditional paper-based publicity methods, try using a range of different social media platforms; a project website or blog. Create digital content such as videos and podcasts that can be shared with the community.
- Holding hybrid meetings – allowing the community to attend a meeting either in person or online via technologies such as Microsoft Teams and Zoom.
- Using online surveys (e.g. SurveyMonkey or Microsoft Forms) to engage and consult with the community. They can also be used to evaluate a projects' impact.
- Consider appointing a team of digital champions to support the project to exploit the benefits of digital technologies.
- Encouraging more users in the community to engage with digital technologies.
- Engage with [Superfast Business Wales](#) or [Digital Communities Wales](#) for further ideas and advice on improving your digital content and skills.
- For info - [Digital Toolkit for Business \(gov.wales\)](#)

Equality of Opportunity

Equality is a short-hand term for all work carried out by an organisation to promote equal opportunities and challenge discrimination, both in employment and in carrying out its work and delivering services.

By putting equality right at the heart of project design and implementation, organisations are more likely to achieve better outcomes.

Procurement

Purchasing goods, services or works

When procuring works, goods and services, applicants are expected to conduct the process in a manner which ensures openness, value for money and fairness and must follow the procurement procedures as they are outlined in this section.

Procurement Thresholds

The precise procedures to be followed will depend upon the size of the order or contract to be let. Carmarthenshire County Council (CCC) operates a graduated set of procedures which recognises the need to lighten administrative requirements for contracts involving smaller amounts. All applicants must adhere to the rules included at Annex D.

Public sector bodies that are covered by the EC Procurement Directives are required to follow their own organisational procurement rules and procedures.

Failure to fully comply with the procurement thresholds will render the costs ineligible for assistance under this fund.

Subsidy Control

The Heritage, Tourism and Culture Fund is being operated under UK Subsidy Rules - <https://www.gov.uk/government/collections/subsidy-control-regime>

General Conditions

Capital Projects - the grant will be recovered should the organisation cease to trade, relocate or the property sold on within 5 years of award.

For properties constructed or improved as part of a grant scheme administered by CCC, the Authority will seek to register an interest in the grant-aided property with the Land Registry by either a Restriction or a Legal Charge as follows:

- Grant awards under £25k – No restriction
- Restrictions to be placed with Land Registry for projects or schemes receiving grants directly from or via the authority of £25,001 to £50,000 for the period relevant to the funding programme under which the grant is being paid.
- Legal Charge and Restriction to be placed with Land Registry for projects or schemes receiving grants of £50,001 & above for the period relevant to the funding programme under which the grant is being paid.

This process will alert the authority to any change in the ownership of the property and of any potential consequence on the terms and conditions on which the grant was awarded. The grant recipient will be responsible for pursuing the removal of any Restriction or Legal Charge and any costs associated with the process, at the end of the period.

It is strongly recommended that goods purchased in relation to the grant are purchased using the business bank account.

If eligible expenditure is lower than anticipated in the grant offer, the grant will be reduced on a pro rata basis.

Payment of grant will be retrospective and will be on submission of evidence of expenditure and projects outcomes in the form of original paid invoices and relevant bank statements evidencing project expenditure. Voluntary and non-profit making organisations may be entitled to claim grant payments monthly, bimonthly or quarterly in advance to assist with cashflow. Where applicable, applicants must make a case to the County Council for approval to receive advance payments.

The applicant must accept the terms and conditions of the grant by completing the Funding Agreement within 30 days from receipt. All expenditure associated to the grant must be completed in line with the Funding Agreement and approved expenditure.

Should the project not proceed within the period stipulated in the offer of grant, the offer of grant will automatically lapse. An extension of the grant offer period can be made, provided that a request is made in writing. Any variation to the Terms & Conditions set out in the Offer Letter must be requested and agreed.

For all grant purposes monitoring of the claim and evidence will take place with prior notice at 1, 3 and 5 years from the date of award of the grant.

Cash purchases will not be considered for grant payment.

Officers of the authority may undertake site visits prior to any payment of grant funds.

Publicity

Successful applicants must demonstrate support from Carmarthenshire County Council and the UK and Welsh Government's Local Growth Fund including any publicity in relation to the funded project.

Plaques will be provided for capital projects to enable applicants to show recognition of the support provided.

Claw back of grant funds

Funding shall be withheld and/ or, insofar as payment has been made, the grant recipient shall repay funding either in whole or in part, including if:

- a) there has been an overpayment of funding
- b) during its economic life, the project undergoes substantial change defined as being used for purposes other than those specified in the application or having a change of owner without notifying Carmarthenshire County Council.

The economic life is the period up to **5 years** post final payment of grant and repayment of funding will be required as follows:

Date of disposal of asset(s)	Amount to be repaid
Within 1 year	Funding to be repaid in full
Within 2 years	80% of funding to be repaid
Within 3 years	60% of funding to be repaid
Within 4 years	40% of funding to be repaid
Within 5 years	20% of funding to be repaid
After 5 years	No funding to be repaid

The above are minimum repayment requirements. The grant must be repaid in full on demand if:

- the applicant is found to have made any misrepresentation in connection with the application
- the applicant has breached the provision of condition above
- the assets and property (if applicable) are not fully re-instated within 12 months of any occurrence giving rise to loss of or damage to the property

Please Contact:
Heritage, Tourism and Culture Fund
County Hall,
Carmarthen,
Carmarthenshire.
SA31 1JP.
Tel: 01269 590216
Email: bureau@carmarthenshire.gov.uk

Annex A – Programme Outputs and Outcomes

Output	Definition	Audit Evidence
Number of amenities or facilities created or improved	<p>The number of new amenities/facilities created or improved.</p> <ul style="list-style-type: none"> - Amenity/facility means any service contained within a physical structure, including, but not limited to, magistrates courts, police stations, town halls, sports facilities, hospitals and public toilets. - Created means the amenity/facility did not previously exist. - 'Improved' means adding, renovating or repairing facilities with the aim of creating better public space. It does not include maintenance of existing facilities. 	<ul style="list-style-type: none"> • Certificate of practical completion of the works e.g. QS certification of works carried out • Photographs before and after completion of the scheme
Number of people reached	<p>Number of people directly impacted by the LGF intervention. The definition of direct impact will vary across interventions e.g.:</p> <ul style="list-style-type: none"> - Energy efficiency improvements - those living or working within the treated premise. - Engagement schemes - those directly engaging (e.g. reading, viewing, attending). - Direct impact should only be recorded where it can be done so robustly. 	<ul style="list-style-type: none"> • Number of people reached AND Detail of direct impact. • Evidence could include numbers of social media followers, likes, engagements. • Numbers of magazines sold
Outcome	Definition	Audit Evidence
Number of full-time (FTE) jobs safeguarded	<p>A safeguarded job is a permanent and paid job that was at risk prior to support being provided, and which the support helped the business to retain. This includes sole traders and business owners. This includes both part-time and full-time jobs, which should be recorded relative to full-time equivalent (FTE).</p> <ul style="list-style-type: none"> - Safeguarded jobs exclude those created solely to deliver the intervention (e.g., construction, delivery staff admin staff). - FTE should be based on the standard full-time hours of the employer. - At risk is defined as being forecast to be lost within 6 months. - Only count each individual FTE or job once through the lifetime of a project (i.e. it should not be counted every year) - FTE is a measure of an employees scheduled hours in relation to an employer's hours for a full time workweek 	<ul style="list-style-type: none"> • Employer to provide declaration that the job is at risk in the next six months - and how it is associated to the intervention AND Copy of signed contract - include job title and the number of hours per week
Increased visitor numbers	<p>The increase in number of visitor admissions to the local area, including markets, town centre, tourist attractions, green and blue spaces and cultural and heritage venues. The count of attendance should be based on tickets / entry figures, where applicable. The sample of venues tracked should remain the same over time, unless newly established venues are created during the reporting period which can be included.</p>	<ul style="list-style-type: none"> • Evidence of tickets, OR Venue entry numbers OR Visitor monitoring / surveys <p>*n.b. Projects will need to establish baseline data to determine the increased number</p>

Data Protection

We collect and use a wide range of information about different people to deliver our services. These individuals are our customers, clients and employees and the information we hold about them is their personal data. Nearly everything we do as a Council involves processing personal data, like names, addresses or reference numbers.

Data Protection is about making sure that people can trust the Council to use their personal data fairly and responsibly. It also means that we have to comply with specific Data Protection legislation.

The UK General Data Protection Regulation (UK GDPR) is designed to protect personal data and provides individuals with a number of rights in relation to their information. As Council employees, we all have to comply with the UK GDPR.

To find out more about how we use your information, please contact 01267 234567 to obtain our Privacy Notice, or visit our website www.carmarthenshire.gov.wales

Annex B

Application Assessment Criteria

Each application will be assessed against the following weighted scoring criteria. Each criterion will be scored from 0-10. Maximum score – 100.

Selection Criteria	Score	Weighting
Can demonstrate a clearly identified and articulated need that demonstrates clear alignment with one or more of the fund's objectives.	10	x 2 (20)
Deliverability (the project must be deliverable by March 31st 2027)	10	x 2 (20)
Value for Money	10	x 2 (20)
Demonstrates how the project will be sustainable beyond the life of the grant	10	x 2 (20)
Match funding secured	10	x 0.5 (5)
Regional impact	10	x 1.5 (15)
Rating of Response	Score	
Perfect & Fully Compliant Submission – response is very detailed and provides confidence in the applicant's ability to fulfil all requirements.	10	
Excellent Submission – response is detailed and provides confidence in the applicant's ability to fulfil requirements	9	
Very Good Submission – detailed credible and convincing response to the requirements	8	
Good Submission: credible response to the requirement	7	
Satisfactory Submission – adequate response to the requirements and programme objectives	6	
Average Submission – addresses some of the requirements but lacks detail in areas	5	
Acceptable Submission – the response falls short of requirements and is poorly explained but not sufficient to warrant rejection.	4	
FAILURE TO MEET THE MINIMUM STANDARD <u>IN ANY QUESTION</u> WILL RESULT IN YOUR SUBMISSION BEING EXCLUDED FROM THE EVALUATION PROCESS		
Weak Submission – falls short of most of the requirements with weak or no explanation. Only addresses the requirements to a limited degree	3	
Poor Submission – scarcely meets the requirements and raises doubt as to the ability to develop an acceptable and beneficial project	2	
Unacceptable (Major issues) Submission either completely fails to address the criteria or fails to demonstrate any understanding/experience/credibility against the programme objectives.	1	
An unanswered response, or a response that is totally unacceptable and does not fulfil the requirement in any way	0	

Annex C

Examples of provision in accordance with the Welsh Language Standards:

In the table below is a list of examples of commitments that the applicant could make in order to provide in accordance with the Standards. This list is not exhaustive but rather offers suggestions, and the candidate may suggest other commitments. They will be expected to consider the relevance of the below to the work they want to achieve through the grant and commit to as much as possible in line with the size of the turnover of the organisation, and the size of the funding application. Please note however that any organisation employing more than 50 members will be expected to make a significant commitment to the Welsh language, aiming to achieve what is in the list below. Every situation will be considered individually, and advice and support will be available to candidates.

The below can be used when responding to the Welsh language questions in Section 9 Cross Cutting themes.

The Organisation

We will map the organisation's current capacity to deliver in Welsh
We will strive to increase the organisation's capacity to provide in Welsh either by employing staff with Welsh language skills, by using volunteers with Welsh language skills or by working in partnership with another organisation who can provide in Welsh
We will ensure that we have arrangements in place to provide materials in Welsh
We will consider Welsh language provision from the outset, when planning the provision
We have a Welsh Language Policy or Action Plan that outlines our commitment to the Welsh language in everything that we do
We are a Welsh medium organisation that administers and deliver through the medium of Welsh

Publicity

We will publish all publicity materials in Welsh, electronically and on paper. We will ensure that the Welsh promotional materials go out at the same time as English, to the same standard and with the Welsh language in a position in which it will be read first
We will promote our provision / service to a Welsh-speaking audience clearly indicating that there is a Welsh or bilingual provision available
We will encourage Welsh speakers to get involved / use our service / project through the medium of Welsh
We will promote the Welsh language in all activity
Our organisation's Welsh speakers will wear badges that indicate that they can speak Welsh and encourage people to speak Welsh
We will create a Welsh or bilingual identity for my project / service.

Public engagement

We will communicate general message with the public bilingually
We will offer to communicate in Welsh with individuals and then communicate with them in the language they require
We will provide our activity in Welsh
We will deliver our activity bilingually, ensuring that Welsh is treated as favourably as English
If an element of the activity cannot be provided in Welsh for lack of personnel, we will make every effort to ensure that Welsh is treated equally favorably as English, using Welsh facilitators or simultaneous translation for example, or by working in partnership with other organisations
We will promote the Welsh elements of our provision

Ensuring a positive impact on the Welsh language

We have an understanding of the linguistic situation of the county and we understand the need to promote the Welsh language
We will offer Welsh language provision rather than waiting for someone to request it
We will be engaging with Welsh-speaking communities (geographical or otherwise)
We will ensure that our provision does not have a negative impact on overall Welsh language use in the county, including ensuring that our provision does not encourage Welsh speakers to engage with each other in English because of our provision
We will ensure the use of Welsh in all our provision including by those who are less fluent
Our activity will provide an opportunity for people to use their Welsh language or develop their Welsh skills
We will collaborate with partners who promote the Welsh language (Enterprises, Urdd, Young Farmers, Meithrin, Cymraeg i Blant, Welsh medium Schools, Welsh for adults, chapels, choirs, local newspapers, forums and networks that promote the Welsh language)

Annex D - Third Party Grant Procurement Rules (February 2025)

Requirement	Value All values are to be interpreted as inclusive of VAT.	Procurement Process
All	£0 to £9,999	<ul style="list-style-type: none"> • A minimum of 1 written Quotation must be obtained, retained and presented to Project officers. • Best value for money must be obtained and reasonable care must be taken to obtain goods, works or services of adequate quality at a competitive price. A documented record to support the decision must be retained for audit purposes • Please note that the invoice for goods/services/works received is not acceptable and a quote needs to be provided from the supplier to demonstrate that the applicant has ascertained value for money. • Where there are consumables being acquired under the value of £500, this can be considered as an exception these rules, and no quote will need to be obtained for these item(s). Please note that you must submit a written request in advance of the purchase to your project manager for this to be approved.
All	£10,000 and £74,999	<ul style="list-style-type: none"> • A minimum of 3 written Quotations <u>must</u> be sought from competitive sources • The quotes must be based on the same specification, and a closing date to return the quote by must be given. All quotations must be evaluated on a like for like basis. • A documented record of the quotes sought, the evaluation process and the decision to award must be retained for audit purposes. <p>If only one quotation is received, you <u>must</u> contact the Project Manager from Carmarthenshire County Council (CCC) to provide details and justification of the procurement process you have undertaken. The decision to proceed to purchase will be approved by CCC on a case-by-case basis. In circumstances where it is evident that more than one quotation could be sought, there may be a requirement to advertise via Sell2Wales</p>

Goods and Services	£75,000 and £214,904¹	<ul style="list-style-type: none"> • A minimum of 4 tenders <u>must</u> be sought from competitive sources, with a minimum of 2 tenders to be received. • All those tendering must be provided with the same information: the same specification of requirements an outline of the evaluation criteria against which the tender will be evaluated and the same closing date for receipt of tenders, after which no tenders will be accepted. • The evaluation process you follow must be consistent with the original evaluation criteria outlined and an evaluation report produced detailing on what basis the successful tender was awarded. It is best practice to establish an evaluation panel to evaluate tenders. <p>If only one tender is received, you must contact the Project Manager from Carmarthenshire County Council (CCC) to provide details and justification of the procurement process you have undertaken. The decision to proceed to purchase must be approved by CCC on a case-by-case basis. In circumstances where it is evident that more than one tender could be sought, there may be a requirement for the applicant to advertise via Sell2Wales.</p>
Works	£75,000 and £5,372,609²	<ul style="list-style-type: none"> • A minimum of 4 tenders <u>must</u> be sought from competitive sources with a minimum of 3 tenders to be received • All those tendering must be provided with the same information: the same a specification of requirements, an outline of the evaluation criteria against which the contract will be awarded and the same closing date for receipt of tenders, after which no tenders will be accepted. • The evaluation process you follow must be consistent with the original evaluation criteria outlined and an evaluation report produced detailing on what basis the successful tender was awarded. It is best practice to establish an evaluation panel to evaluate tenders. • Please note that for specific grant schemes in relation to capital works projects, applicants must ensure that they follow the guidelines of the funding body as there may be specific requirements and processes that must be followed. Please make sure that you

¹ The UK public procurement thresholds are updated every two years, with changes typically coming into effect on January 1 of the update year (most recently updated 1st January 2024).

² The UK public procurement thresholds are updated every two years, with changes typically coming into effect on January 1 of the update year (most recently updated 1st January 2024).

		<p>have discussed this with your Project officer\manager.</p> <p>If only one or two tender(s) is received, you must contact the Project Manager from Carmarthenshire County Council (CCC) to provide details and justification of the procurement process you have undertaken. The decision to proceed to purchase must be approved by CCC on a case-by-case basis. In circumstances where it is evident that more than one tender could be sought, there will be a requirement for the applicant to advertise via Sell2Wales.</p> <p>For works contracts in excess of £250k in value:</p> <ul style="list-style-type: none"> As a minimum, due diligence such as Companies House checks, VAT number checks, Website checks etc, as well as financial checks must be undertaken on the preferred contractor following the evaluation and prior to contract award.
Goods and Services	Above £214,904	If a contract for Goods or Services is likely to exceed £214,904 (inclusive of VAT) the applicant must inform the project manager to determine whether the contract will be subject to the Procurement Act 2023
Works	Above £5,372,609	If a contract for works is likely to exceed £5,372,609 (inclusive of VAT) the applicant must inform the project manager to determine whether the contract will be subject to the Procurement Act 2023
<p>Applicants are requested to ‘Think Carmarthenshire First’ when seeking quotations for the purchase of Goods/Services and Works. Please therefore, explore the marketplace to establish if there are any businesses within Carmarthenshire that can provide the goods / service or works that you are seeking to purchase. Applicants may be required to demonstrate such quotations have been sought.</p>		
<p>In exceptional circumstances where the goods, works or services has been identified as specialist, and/or where only one particular company is suitable for the specification provided, the applicant must submit a written request to the project manager prior to the purchase to request to waiver the requirements for competition.</p>		
<p>All applicants are advised to read the guidance attached. Terminology and definitions are explained below.</p>		

Important Guidance **Advertising via Sell2Wales**

If you are in a situation where you have difficulty in identifying the minimum number of suppliers required and/or would like to vary or attract new suppliers to quote or tender it is possible for you to advertise on the National Procurement website, www.Sell2Wales.co.uk. Advertising via Sell2Wales is best practice, however you may feel that you are better able to identify potential suppliers who could provide the best overall offer.

This facility is available to you free of charge, please visit the Sell2Wales website <http://www.sell2wales.gov.uk/> and contact the website helpline on 0800 222 9004 for further information.

Seeking Quotations/Tenders

For spend above £10,000 it is essential that the quotes/tenders are sought from appropriate suppliers for the goods, works or services required. In circumstances where it is evident that unsuitable quotes/tenders have been sought, there may be a requirement to advertise via Sell2Wales.

Due diligence

As part of the assessment process you are required to carry out due diligence checks on the supplier/contractor you plan to use to deliver the grant. The purpose of these checks is to verify that the company is a bona fide company. These checks include - checking the company's details on company's house, checking that the VAT number included in the application is correct and matches the company's details. Checks may also be appropriate on company websites to view the company's portfolio and the type of work and projects that company have previously undertaken. This offers certainty that they would be suitable for the proposed project.

Avoiding conflicts of interest

We recognise that it is possible that applicants / developers or persons connected with them (such as relatives, business partners or friends) may wish to tender for a contract being offered by the applicant / developer. This is acceptable, but applicants will need to ensure that the tendering process is undertaken in an open, transparent and fair manner, as outlined above, which does not give one person or company tendering any advantage over another, which arises from the process. Appropriate measures to prevent identify and remedy any conflicts of interest must be carried out. If an applicant / developer or any person connected with them directly or indirectly, has a financial, economic, political, or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure:

- that applicant / developer, or any other person or party with an interest must declare that interest in writing to the Project officer who will offer advice accordingly.
- specifications and evaluation criteria must not be biased or tailored to favour one solution or any one party over another.
- that person or party with an interest should take no part whatsoever in any of the tender evaluation procedures to ensure that the process is fair to all. It is acknowledged that Carmarthenshire County Council be required to provide the final approval.
- every stage of the procedure must be recorded formally.

The purpose of these guidelines is to ensure that there is fairness in the spending of public money and that the integrity of the applicant is not compromised.

Changes to the specification or contract

If any changes are required to the specification after seeking quotes/tenders which affects the original scope of the requirement, a new procurement exercise will need to be undertaken to ensure that best value for money has been achieved. This may occur where there are unforeseen additions to the original requirement, where tenders are received more than the available budget, where funding levels change etc. The grant applicant must inform the Project officer who will offer advice accordingly.

Do's and Don'ts of Tendering

Do's	Don'ts
<ul style="list-style-type: none"> • Do ensure that any potential conflicts of interest are declared at the earliest opportunity. 	<ul style="list-style-type: none"> • Don't skew the specification to eliminate or to discriminate against suppliers i.e. limit the specification to a specific brand.
<ul style="list-style-type: none"> • Do comply with the appropriate rules 	<ul style="list-style-type: none"> • Don't change the scope of the specification once distributed.
<ul style="list-style-type: none"> • Do ensure that the specification is precise and not in excess of the requirements. 	<ul style="list-style-type: none"> • Don't change the evaluation criteria during the process.
<ul style="list-style-type: none"> • Do ensure that the Evaluation Criteria is directly relevant to the subject of the contract 	<ul style="list-style-type: none"> • Don't give companies too short notice to quote.
<ul style="list-style-type: none"> • Do complete and retain full records for future reference and audit purposes 	<ul style="list-style-type: none"> • Don't enter too into any verbal communication with suppliers regarding specific questions. The same information must be provided to all suppliers via email to ensure the process is fair and documented.
<ul style="list-style-type: none"> • Do ensure that quotes/tenders are evaluated on a 'like for like' basis. 	<ul style="list-style-type: none"> • Don't reveal prices to potential suppliers.
<ul style="list-style-type: none"> • Do ensure that you treat suppliers in an open, transparent, and non-discriminatory manner. 	<ul style="list-style-type: none"> • Don't breach confidentiality.
<ul style="list-style-type: none"> • Do allow sufficient time for companies to quote 	<ul style="list-style-type: none"> • Don't open quotes/tenders in advance of the deadline.
<ul style="list-style-type: none"> • Do ensure the value of the Goods, Works or Service is estimated accurately at the start of the process to apply the correct procurement process. 	<ul style="list-style-type: none"> • Don't consider submissions received after the deadline.

Procurement terminology and definitions

Title	Description
Contract	<p>A Contract for the purposes of these Rules shall be any agreement between the grant applicant and one or more other parties for : -</p> <ul style="list-style-type: none"> • the sale of goods or materials. • the supply of goods or materials. • the execution of works

	<ul style="list-style-type: none"> the provision of services (including accommodation and facilities).
Consumables	Consumables are consumer goods used by individuals and businesses that must be replaced after being used. Consumables can be everyday items that must be consistently replaced and those that wear out over longer periods. Many consumable goods are more affordable than other types of goods because they are meant to be replaced frequently. Some consumables are designed for one-time use while others can be used multiple times.
Competitive Source	an independent supplier bidding against another independent provider
Goods	Are material items i.e. equipment, food, vehicles etc
Evaluation	A method of determining which quotation or tender provides the best value for money in accordance with the pre-determined evaluation criteria. These criteria help ensure that the decision-making process is fair, transparent, and aligned with the objectives
Evaluation Criteria	A list of key requirements used to assess quotations or tenders received from competitive sources the criteria by which the most advantageous tender will be determined, based on a combination of price/cost and quality criteria.
Evaluation Panel	It is best practice to establish an evaluation panel to undertake the evaluation exercise. It may be appropriate to have a cross functional team as a panel. Panel should agree the specification and evaluation criteria in advance. The panel should be consistent throughout each stage of procurement exercise
Procurement Act 2023	The Procurement Act 2023 is a legal framework that governs how public sector organizations in the UK purchase goods, services, and works. It aims to ensure fairness, transparency, and value for money while supporting competition and innovation.
Sell2Wales	Is website where all public sector contracts are advertised. Third Party Grant Recipients can also advertise via the website free of charge, please visit the Sell2Wales website http://www.sell2wales.gov.uk/ and contact the website helpline on 0800 222 9004 for further information.
Services	Tasks undertaken by people i.e. consultancy services, translation services etc
Specification	This is a written statement that defines the requirements. The specification will vary according to the work, product or service concerned. For a simple product the specification may be a brief description, while in the case of a complex requirement it will be a comprehensive document. The description of the goods, works or services required must not refer to a specific make, brand, or source.
Tender/Quote	is the document compiled by a potential supplier in response to an invitation to quote/tender. It sets out general information demonstrating the capability and eligibility of the supplier - including detailed information about how they propose to fulfil the specifications of the requirement.
Works	Include construction building works, civil engineering, etc

*'Mae croeso i chi gysylltu gyda'r cyngor trwy gyfrwng y Gymraeg neu'r Saesneg.
You are welcome to contact the council through the medium of Welsh or English*