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Contract

Wheatley Group Legal & Associated Services Framework LEG001

The Wheatley Housing Group Limited

F03: Contract award notice

Notice identifier: 2023/S 000-007159

Procurement identifier (OCID): ocds-h6vhtk-03b219

Published 13 March 2023, 8:50am

Section I: Contracting authority

I.1) Name and addresses

The Wheatley Housing Group Limited

25 Cochrane Street

Glasgow

G1 1HL

Contact

Julieth Ani

Email

julieth.ani@wheatley-group.com

Telephone

+44 7385968883

Country

United Kingdom

NUTS code

UKM - Scotland

Internet address(es)

Main address

<http://www.wheatley-group.com>

Buyer's address

http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA10306

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Housing and community amenities

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Wheatley Group Legal & Associated Services Framework LEG001

Reference number

LEG001

II.1.2) Main CPV code

- 79100000 - Legal services

II.1.3) Type of contract

Services

II.1.4) Short description

The Wheatley Group intends to establish a multi-lot Framework Agreement for the provision of Legal & Associated Services. The Framework will be divided into 7 lots covering Lot 1 Commercial Contracts Lot 2 Legal Governance & Charities Lot 3 Legal Employment & General Civil Litigation Lot 4 Financing Lot 5a – Sheriff Officer Services (Central Scotland Region) Lot 5b - Sheriff Officer Services (Dumfries and Galloway Region) Lot 6 Property Searching & Reporting Services. The Framework will be for a period of 36 months with the option to extend for a further 12 months at the sole discretion of the Wheatley Group.

Lot 1 – Commercial Contracts – including as a minimum procurement, construction, construction litigation, development, real estate, intellectual property, information technology and associated legal advice.

Lot 2 – Legal Governance & Legal Charities – including as a minimum governance and business structures, data protection, charities advice including business structures and corporate matters and associated legal advice.

Lot 3 - Legal Employment & General Civil Litigation – including as a minimum employment law, pensions advice and general civil litigation services.

Lot 4 – Financing– including as a minimum capital markets and bank funding in relation to new and existing funding and relating to both Scottish and English law

Lot 5a – Sheriff Officer Services (Central Scotland Region).

Lot 5b – Sheriff Officer Services (Dumfries and Galloway Region).

Lot 6 – Property Searching & Reporting Services.

II.1.6) Information about lots

This contract is divided into lots: Yes

II.1.7) Total value of the procurement (excluding VAT)

Value excluding VAT: £3,600,000

II.2) Description

II.2.1) Title

Lot 1 Commercial Contracts

Lot No

1

II.2.2) Additional CPV code(s)

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services
- 75231100 - Law-courts-related administrative services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Lot 1 Commercial Contracts covers the following areas as a minimum: procurement, construction, development, real estate, intellectual property, information technology, environmental and planning law, litigation support and associated legal advice.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Lot 2 Legal Governance & Charities

Lot No

2

II.2.2) Additional CPV code(s)

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services
- 75231100 - Law-courts-related administrative services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Lot 2 Legal Governance & Legal Charities including as a minimum governance and business structures, data protection, charities advice including legal structural business and corporate matters and associated legal advice.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Lot 3 Legal Employment & General Civil Litigation

Lot No

3

II.2.2) Additional CPV code(s)

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services
- 75231100 - Law-courts-related administrative services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Lot 3 Legal Employment & General Civil Litigation to cover as a minimum: employment law, pensions and court litigation services. Employment law advice to the Group's Human Resource (HR) department both on a rolling ad hoc basis and in relation to any specific projects affecting the employment status of the employees within the Group companies,

keeping our HR department up to date on relevant changes in employment law, advice on compromise agreements, employment tribunal representation where required, TUPE and advice to the in-house legal team in relation to TUPE or other employment issues that may arise in relation to individual projects or third party contracts. Pension's advice is also included.

Litigation primarily in relation to Court of Session cases, including Judicial Review. Advice and support may be required with housing related litigation including Anti-Social Behaviour Orders and actions for eviction, defence of reparation actions, and actions for Reduction, Suspension and Interdict, although this type of work is generally handled in-house.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Lot 4 Financing

Lot No

4

II.2.2) Additional CPV code(s)

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services

- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services
- 75231100 - Law-courts-related administrative services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Lot 4 providing legal services associated with the area of Financing as follows?

Treasury (debt finance, listed securities, bonds);

Banking and finance including the raising of new, and management of existing bank and capital markets funding;

Issuance and hedging arrangements;

Charging and security work;

FCA and financial regulatory support;

Mergers & acquisitions;

Acquisitions and disposals;

Joint ventures;

Corporate finance;

Financial services regulation;

Corporate insolvency law;

Constitutional issues;

Corporate governance;

New business opportunities;

Amalgamations and restructuring;

Stock transfers;

Taxation advice;

Co-operative & Community Benefit societies law;

Grant applications e.g. Big Lottery funding.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Lot 5a Sheriff Officer Services - Central Scotland Region

Lot No

5

II.2.2) Additional CPV code(s)

- 79940000 - Collection agency services
- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services

- 79130000 - Legal documentation and certification services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Sheriff Officer services which will be required to cover the Central Scotland Region in relation to this lot arise from litigation in relation to rent arrears recovery, general debt recovery for former tenant arrears, litigation to recover factoring debt, anti-social evictions and anti-social behaviour orders. The Sheriff Officers must have experience in providing a wide range of Sheriff Officer services and dealing with a high volume of work. The Sheriff Officers must employ appropriate numbers of suitably qualified staff with a sufficiently broad range of expertise to meet our requirements.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 100

Price - Weighting: 0

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

Lot 5b Sheriff Officer Services - Dumfries and Galloway Region

Lot No

6

II.2.2) Additional CPV code(s)

- 79940000 - Collection agency services

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Sheriff Officer services which will be required to cover the Dumfries and Galloway Region in relation to this lot arise from litigation in relation to rent arrears recovery, general debt recovery for former tenant arrears, litigation to recover factoring debt, anti-social evictions and anti-social behaviour orders. The Sheriff Officers must have experience in providing a wide range of Sheriff Officer services and dealing with a high volume of work. The Sheriff Officers must employ appropriate numbers of suitably qualified staff with a sufficiently broad range of expertise to meet our requirements.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 100

Price - Weighting: 0

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 IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

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.2.1) Previous publication concerning this procedure

Notice number: [2022/S 022-191181](#)

Section V. Award of contract

Lot No

5

Title

Lot 5a Sheriff Officer Services - Central Scotland Region

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 4

Number of tenders received from SMEs: 4

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 4

Number of tenders received by electronic means: 4

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

Walker Love

16 Royal Exchange Square

Glasgow

G1 3AB

Telephone

+44 1412488224

Country

United Kingdom

NUTS code

- UKM82 - Glasgow City

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £800,000

Section V. Award of contract

Lot No

1

Title

Lot 1 Commercial Contracts

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 8

Number of tenders received from SMEs: 8

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 8

Number of tenders received by electronic means: 8

The contract has been awarded to a group of economic operators: Yes

V.2.3) Name and address of the contractor

Brodies

58 Morrison Street

Edinburgh

EH3 8BP

Telephone

+44 1316563720

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Morton Fraser

Quartermile Two, 2 Lister Square

Edinburgh

EH3 9GL

Telephone

+44 1312471210

Country

United Kingdom

NUTS code

- UKM75 - Edinburgh, City of

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Shepherd and Wedderburn LLP

1 Exchange Crescent, Conference Square

Edinburgh

EH3 8UL

Telephone

+44 1314735786

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £600,000

Section V. Award of contract

Lot No

2

Title

Lot 2 Legal Governance & Charities

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 5

Number of tenders received from SMEs: 5

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 5

Number of tenders received by electronic means: 5

The contract has been awarded to a group of economic operators: Yes

V.2.3) Name and address of the contractor

Brodies

58 Morrison Street

Edinburgh

EH3 8BP

Telephone

+44 1316563720

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Thorntons Law LLP

33 Yeaman Shore

Dundee

DD1 4BJ

Telephone

+44 1312408607

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Harper Macleod LLP

The Ca'd'oro, 45 Gordon Street

Glasgow

G1 3PE

Telephone

+44 1412279411

Country

United Kingdom

NUTS code

- UKM82 - Glasgow City

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £380,000

Section V. Award of contract

Lot No

3

Title

Lot 3 Legal Employment & General Civil Litigation

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 6

Number of tenders received from SMEs: 6

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 6

Number of tenders received by electronic means: 6

The contract has been awarded to a group of economic operators: Yes

V.2.3) Name and address of the contractor

Brodies

58 Morrison Street

Edinburgh

EH3 8BP

Telephone

+44 1316563720

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Burness Paull LLP

50 Lothian Road, Festival Square

Edinburgh

EH3 9WJ

Telephone

+44 1313574462

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Thorntons Law LLP

33 Yeaman Shore

Dundee

DD1 4BJ

Telephone

+44 1312408607

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £320,000

Section V. Award of contract

Lot No

4

Title

Lot 4 Financing

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 5

Number of tenders received from SMEs: 5

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 5

Number of tenders received by electronic means: 5

The contract has been awarded to a group of economic operators: Yes

V.2.3) Name and address of the contractor

Brodies

58 Morrison Street

Edinburgh

EH3 8BP

Telephone

+44 1316563720

Country

United Kingdom

NUTS code

- UKM - Scotland

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Harper Macleod LLP

The Ca'd'oro, 45 Gordon Street

Glasgow

G1 3PE

Telephone

+44 1412279411

Country

United Kingdom

NUTS code

- UKM82 - Glasgow City

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

Pinsent Masons

30 Crown Place , London

London

EC2A 4ES

Telephone

+44 2074906605

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

No

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £1,200,000

Section V. Award of contract

Lot No

6

Title

Lot 5b Sheriff Officer Services - Dumfries and Galloway Region

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

14 November 2022

V.2.2) Information about tenders

Number of tenders received: 3

Number of tenders received from SMEs: 3

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 3

Number of tenders received by electronic means: 3

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

Stirling Park LLP

24 Blythswood Square

Glasgow

G2 4BG

Telephone

+44 7801136853

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £160,000

Section VI. Complementary information

VI.3) Additional information

Economic operators may be excluded from this competition if they are in any of the situations referred to in regulation 58 of the Public Contracts (Scotland) Regulations 2015.

Bidders responses to the SPD will be assessed on the basis of:

Questions 2A.1 – 2D.1.1 Information Only;

Questions 3A – 4A. Pass or Fail;

Question 4B.1.1 –Information Only

Applicable Questions in 4B - Pass/Fail

Applicable Questions in 4C - Scored

Question 4C.10 –Information Only

More information in Appendix 1 Instructions to Tenderers document (from page 16)

(SC Ref:725623)

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court and Justice of the Peace Court

1 Calton Place

Glasgow

G5 9DA

Country

United Kingdom

Internet address

<http://www.wheatley-group.com>