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Contract

Framework for Commercial Agency Services

Surrey Heath Borough Council

F03: Contract award notice

Notice identifier: 2023/S 000-023213

Procurement identifier (OCID): ocds-h6vhtk-03c3ab

Published 9 August 2023, 12:05pm

Section I: Contracting authority

I.1) Name and addresses

Surrey Heath Borough Council

Surrey Heath House, Knoll Road

Camberley

GU15 3HD

Contact

Vincent Hunt

Email

vincent@vfhuntltd.onmicrosoft.com

Telephone

+44 7970659846

Country

United Kingdom

Region code

UKJ25 - West Surrey

Internet address(es)

Main address

<https://www.surreyheath.gov.uk>

I.4) Type of the contracting authority

Regional or local authority

I.5) Main activity

General public services

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Framework for Commercial Agency Services

Reference number

777289126

II.1.2) Main CPV code

- 70330000 - Property management services of real estate on a fee or contract basis

II.1.3) Type of contract

Services

II.1.4) Short description

Surrey Heath Borough Council (SHBC) is currently looking to set up a new multi-agency framework for SHBC investment agency services. Appointed suppliers will support the

Council with acquisitions and disposals of property and land. The agents will be required to assist with the acquisition and disposal of retail, office, leisure, industrial and community assets. There is a further requirement for the agents to review the market for potential acquisition opportunities that may be of interest to the Council and present those for consideration. The Council will consider the assets that meet the following criteria: assist regeneration, promote economic growth, protect employment. There will be 3 lots:-
 1.1 Lot 1: Commercial sales and acquisitions
 1.2 Lot 2: residential sales and acquisitions
 1.3 Lot 3: retail sales and acquisitions
 Please note that the Council will be holding a bidder information meeting between the 9th and 12th May 2023.

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: £1,398,000

II.2) Description

II.2.1) Title

1.1 Lot 1: Commercial sales and acquisitions

Lot No

Lot 1

II.2.2) Additional CPV code(s)

- 70332200 - Commercial property management services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 1 are set out below: 3.1.1
 Overview of Surveying Services Requirements The Council requires the Framework

Provider to be able to provide professional management, advice, guidance, negotiation and assistance on property and estates issues but for all the services on the following list. This list covers the main services required: ?Acquisition of freehold and leasehold property ?Disposal (includes letting and or commercial arrangements) of freehold and leasehold property ?Rent reviews ?Lease breaks and lease expires ?Lease renewals ?Dilapidations ?Landlord and Tenant issues including Landlord consents, service charges and claims ?Rating support services ?Strategic advice including the preparation and development of an estate strategy ?Procurement strategy for property related issues. ?Development consultancy and advice ?Valuations ?Planning and Planning Viability Assessments ?Condition surveys ?General advice on estate and property management ?General management duties ?Compulsory purchase ?Daylighting/ sunlighting/ overshadowing and rights of light ?Party wall awards ?Wayleaves and easements ?Other neighbourly matters

II.2.5) Award criteria

Quality criterion - Name: Quality via method statements / Weighting: 60

Cost criterion - Name: Financial Bid Back / Weighting: 40

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.2.14) Additional information

To respond to this opportunity please click here: <https://www.delta-sourcing.com/respond/6C7634VEG3>

II.2) Description

II.2.1) Title

1.2Lot 2: residential sales and acquisitions

Lot No

II.2.2) Additional CPV code(s)

- 70331000 - Residential property services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 2 are set out below:

3.3.1 Disposal of freehold and leasehold property including shared ownership properties – Residential Where surplus property, space or holdings have been identified and, on receipt of an Order, the Provider will provide an initial report with budget costs, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Council. Following agreement with the Council, the Provider will undertake and manage the marketing and disposal through to a satisfactory conclusion for the Council and will provide a comprehensive final report to support a recommendation, including any need to claw back, with advice on amounts and mechanism.

3.3.2 Acquisition of freehold and leasehold property including shared ownership properties - Residential Following agreement on a procurement strategy, the Provider will undertake and manage a comprehensive search of available property solutions.

3.3.3 Valuations – Residential Valuations to the appropriate RICS standards are to be provided by the Provider where necessary in the provision of the Surveying Services outlined above. The Council may require independent standalone valuations which can take a number of forms including: Full valuations In accordance with RICS Valuation – Professional Standards March 2012, capital and rental values. Desk top Based upon property information provided by the Council, without the need for inspection – capital and rentals values. Capital Charge For internal charging purposes. Valuations to be based upon current open market existing use value (EUV); alternative use value (AUV), where that is greater and apportioned between land and buildings, with an assessment of remaining economic life. Independent ‘check’ valuations Verification of capital and rental values.

II.2.5) Award criteria

Quality criterion - Name: Method statement scores / Weighting: 60

Cost criterion - Name: Financial bid back score / Weighting: 40

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 - RETAIL SALES, ACQUISITIONS, VALUATIONS, LETTINGS, MANAGEMENT

Lot No

3

II.2.2) Additional CPV code(s)

- 70332000 - Non-residential property services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 3 are set out below: 3.4.1 Disposal of freehold and leasehold property – Retail Where surplus property, space or holdings have been identified and, on receipt of an Order, the Provider will provide an initial report with budget costs, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Council. Following agreement with the Council, the Provider will undertake and manage the marketing and disposal through to a satisfactory conclusion for the Council and will provide a comprehensive final report to support a recommendation, including any need to claw back, with advice on amounts and mechanism. 3.4.2 Acquisition of freehold and leasehold property - Retail Following agreement on a procurement strategy, the Provider will undertake and manage a

comprehensive search of available property solutions. 3.4.3 Valuations – Retail Valuations to the appropriate RICS standard are to be provided by the Provider where necessary in the provision of Estates Services outlined above. The Council may require independent standalone valuations which can take a number of forms including: Full valuations In accordance with RICS Valuation – Professional Standards March 2012, capital and rental values.

II.2.5) Award criteria

Quality criterion - Name: Method statement scores / Weighting: 60

Cost criterion - Name: Financial Bid Back / Weighting: 40

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.1.8) 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: [2023/S 000-011704](#)

Section V. Award of contract

Lot No

1

Title

Commercial Agency Services

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

2 August 2023

V.2.2) Information about tenders

Number of tenders received: 11

Number of tenders received from SMEs: 7

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

Number of tenders received from tenderers from non-EU Member States: 0

Number of tenders received by electronic means: 11

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

V.2.3) Name and address of the contractor

CITICENTRIC LIMITED

CITICENTRIC HOUSE, 20 THE GROVE

WOKING

GU21 4AE

Country

United Kingdom

NUTS code

- UKJ2 - Surrey, East and West Sussex

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

LAMBERT SMITH HAMPTON GROUP LIMITED

55 WELLS STREET

LONDON

W1T 3PT

Country

United Kingdom

NUTS code

- UKI - London

National registration number

UK

The contractor is an SME

No

V.2.3) Name and address of the contractor

VAIL WILLIAMS LLP

VAIL WILLIAMS LLP, SAVANNAH HOUSE, 3 OCEAN WAY, OCEAN VILLAGE

SOUTHAMPTON

SO14 3TJ

Country

United Kingdom

NUTS code

- UKJ32 - Southampton

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

HARTNELL TAYLOR COOK LLP

NIGHTINGALE HOUSE, REDLAND HILL, REDLAND

BRISTOL

BS6 6SH

Country

United Kingdom

NUTS code

- UKK1 - Gloucestershire, Wiltshire and Bristol/Bath area

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

JONES LANG LA SALLE LIMITED

30 WARWICK STREET

LONDON

W1B 5NH

Country

United Kingdom

NUTS code

- UKI - London

National registration number

UK

The contractor is an SME

No

V.2.3) Name and address of the contractor

STILES HAROLD WILLIAMS PARTNERSHIP LLP

21- 33 DYKE ROAD

BRIGHTON

BN1 3FE

Country

United Kingdom

NUTS code

- UKJ21 - Brighton and Hove

National registration number

UK

The contractor is an SME

Yes

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

Initial estimated total value of the contract/lot: £466,000

Total value of the contract/lot: £466,000

Section V. Award of contract

Lot No

2

Title

Residential Sales and Acquisitions

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

2 August 2023

V.2.2) Information about tenders

Number of tenders received: 4

Number of tenders received from SMEs: 3

Number of tenders received by electronic means: 4

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

V.2.3) Name and address of the contractor

PHI CAPITAL INVESTMENTS LIMITED

CHERTSEY ROAD, 61 CHERTSEY ROAD

WOKING

GU21 5BN

Country

United Kingdom

NUTS code

- UKJ25 - West Surrey

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

LAMBERT SMITH HAMPTON GROUP LIMITED

55 WELLS STREET

LONDON

W1T 3PT

Country

United Kingdom

NUTS code

- UKI - London

National registration number

UK

The contractor is an SME

No

V.2.3) Name and address of the contractor

MADISON BROOK LIMITED

RAILWAY ARCHES, 8A CHANCEL STREET

LONDON

SE1 0UR

Country

United Kingdom

NUTS code

- UKI - London

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

STILES HAROLD WILLIAMS PARTNERSHIP (SHW) LLP

21- 33 DYKE ROAD

BRIGHTON

BN1 3FE

Country

United Kingdom

NUTS code

- UKJ21 - Brighton and Hove

National registration number

UK

The contractor is an SME

Yes

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

Initial estimated total value of the contract/lot: £466,000

Total value of the contract/lot: £466,000

Section V. Award of contract

Lot No

3

Title

RETAIL SALES AND ACQUISITIONS

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

2 August 2023

V.2.2) Information about tenders

Number of tenders received: 7

Number of tenders received from SMEs: 6

Number of tenders received by electronic means: 7

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

V.2.3) Name and address of the contractor

SPECIALIST PROPERTY ADVISORS UK LLP TRADING AS BODDY AND EDWARDS

CLUB CHAMBERS, MUSEUM STREET

YORK

YO1 7DN

Country

United Kingdom

NUTS code

- UKE21 - York

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

CITICENTRIC LIMITED

CITICENTRIC HOUSE, 20 THE GROVE

WOKING

GU21 4AE

Country

United Kingdom

NUTS code

- UKJ25 - West Surrey

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

HARTNELL TAYLOR COOK LLP

NIGHTINGALE HOUSE, REDLAND HILL, REDLAND

BRISTOL

BS6 6SH

Country

United Kingdom

NUTS code

- UKK11 - Bristol, City of

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

JONES LANG LA SALLE LIMITED

30 WARWICK STREET

LONDON

W1B 5NH

Country

United Kingdom

NUTS code

- UKI - London

National registration number

UK

The contractor is an SME

No

V.2.3) Name and address of the contractor

OWEN ISHERWOOD LIMITED

1 WEY COURT, MARY ROAD

GUILDFORD

GU1 4QU

Country

United Kingdom

NUTS code

- UKJ2 - Surrey, East and West Sussex

National registration number

UK

The contractor is an SME

Yes

V.2.3) Name and address of the contractor

STILES HAROLD WILLIAMS PARTNERSHIP (SHW) LLP

21- 33 DYKE ROAD

BRIGHTON

BN1 3FE

Country

United Kingdom

NUTS code

- UKJ21 - Brighton and Hove

National registration number

UK

The contractor is an SME

Yes

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

Initial estimated total value of the contract/lot: £466,000

Total value of the contract/lot: £466,000

Section VI. Complementary information

VI.3) Additional information

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=800232832>

GO Reference: GO-202389-PRO-23610059

VI.4) Procedures for review

VI.4.1) Review body

Royal Courts of Justice

Strand,

London

WC2A 2LL

Country

United Kingdom

VI.4.4) Service from which information about the review procedure may be obtained

Royal Courts of Justice

Strand,

London

WC2A 2LL

Country

United Kingdom

