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Contract

## **Variation to Strategic Investment Model (SIM) Management Services contract**

Crown Estate Scotland

F20: Modification notice

Notice identifier: 2023/S 000-029299

Procurement identifier (OCID): ocds-h6vhtk-039a63

Published 4 October 2023, 3:49pm

### **Section I: Contracting authority/entity**

#### **I.1) Name and addresses**

Crown Estate Scotland

Quartermile Two, 2nd Floor, 2 Lister Square

Edinburgh

EH3 9GL

#### **Contact**

Andy Riley

#### **Email**

[andy.riley@crownestatescotland.com](mailto:andy.riley@crownestatescotland.com)

#### **Telephone**

+44 1314607657

**Country**

United Kingdom

**NUTS code**

UK - United Kingdom

**Internet address(es)**

Main address

<http://crownestatescotland.com/>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA29444](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA29444)

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**Section II: Object****II.1) Scope of the procurement****II.1.1) Title**

Variation to Strategic Investment Model (SIM) Management Services contract

Reference number

JAN469471

**II.1.2) Main CPV code**

- 73220000 - Development consultancy services

**II.1.3) Type of contract**

Services

**II.2) Description****II.2.2) Additional CPV code(s)**

- 79421000 - Project-management services other than for construction work
- 79100000 - Legal services
- 79211000 - Accounting services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement at the time of conclusion of the contract:**

In April 2023, Crown Estate Scotland, as agent on behalf of SOWEC, appointed OVE Arup & Partners to provide a number of management and other associated services (SIM (Strategic Investment Management) Management Service Provider) to the SIM Group for an initial period of up to 12 months. Crown Estate Scotland was to be the contracting party as agent on behalf of the SIM Group pending a new legal entity (SIM legal vehicle) being created. The intention is that, once the SIM legal vehicle has been established, the contract would be novated to that newly created legal entity. The new legal entity has not been established and Crown Estate Scotland (as agent) has continued to be the contracting party with OVE Arup & Partners to ensure the SIM process succeeds.

The value of the original appointment was GBP339,670 which was based on an assumption of a number of applications. Subsequently 44 applications were received which was in excess of the numbers assumed. As a result, there will require to be additional resource allocated to exceed this requirement. The extra resource required to evaluate applications and provide project information to the SIM Group has resulted in an increased contract value of GBP460,000 and the contract expiration date confirmed as 16th April 2024.

### **II.2.7) Duration of the contract, framework agreement, dynamic purchasing system or concession**

Duration in months

12

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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## **Section IV. Procedure**

### **IV.2) Administrative information**

#### **IV.2.1) Contract award notice concerning this contract**

Notice number: [2023/S 000-012888](#)

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## **Section V. Award of contract/concession**

### **Contract No**

JAN469471

### **Title**

Variation to Strategic Investment Model (SIM) Management Services contract

### **V.2) Award of contract/concession**

#### **V.2.1) Date of conclusion of the contract/concession award decision:**

17 April 2023

#### **V.2.2) Information about tenders**

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

#### **V.2.3) Name and address of the contractor/concessionaire**

Ove Arup & Partners

Scotstoun House, South Queensferry, West Lothian

Edinburgh

EH30 9SE

Telephone

+44 1313193027

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor/concessionaire is an SME

No

**V.2.4) Information on value of the contract/lot/concession (at the time of conclusion of the contract;excluding VAT)**

Total value of the procurement: £339,670

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**Section VI. Complementary information**

**VI.3) Additional information**

(SC Ref:746462)

**VI.4) Procedures for review**

**VI.4.1) Review body**

Edinburgh Sheriff Court

Sheriff Court House, 27 Chambers Street

Edinburgh

EH1 1LB

Telephone

+44 1312252525

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/edinburgh-sheriff-court-and-justice-of-the-peace-court>

#### **VI.4.2) Body responsible for mediation procedures**

Edinburgh Sheriff Court

Sheriff Court House, 27 Chambers Street

Edinburgh

EH1 1LB

Telephone

+44 1312252525

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/edinburgh-sheriff-court-and-justice-of-the-peace-court>

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## **Section VII: Modifications to the contract/concession**

### **VII.1) Description of the procurement after the modifications**

#### **VII.1.1) Main CPV code**

- 73220000 - Development consultancy services

#### **VII.1.2) Additional CPV code(s)**

- 79421000 - Project-management services other than for construction work
- 79100000 - Legal services
- 79211000 - Accounting services

#### **VII.1.3) Place of performance**

NUTS code

- UK - United Kingdom

#### **VII.1.4) Description of the procurement:**

In April 2023, Crown Estate Scotland, as agent on behalf of SOWEC, appointed OVE Arup & Partners to provide a number of management and other associated services (SIM (Strategic Investment Management) Management Service Provider) to the SIM Group for an initial period of up to 12 months. Crown Estate Scotland was to be the contracting party as agent on behalf of the SIM Group pending a new legal entity (SIM legal vehicle) being created. The intention is that, once the SIM legal vehicle has been established, the contract would be novated to that newly created legal entity. The new legal entity has not been established and Crown Estate Scotland (as agent) has continued to be the contracting party with OVE Arup & Partners to ensure the SIM process succeeds.

The value of the original appointment was GBP339,670 which was based on an assumption of a number of applications. Subsequently 44 applications were received which was in excess of the numbers assumed. As a result, there will require to be additional resource allocated to exceed this requirement. The extra resource required to evaluate applications and provide project information to the SIM Group has resulted in an increased contract value of GBP460,000 and the contract expiration date confirmed as 16th April 2024.

#### **VII.1.5) Duration of the contract, framework agreement, dynamic purchasing system or concession**

Duration in months

12

### **VII.1.6) Information on value of the contract/lot/concession (excluding VAT)**

Total value of the contract/lot/concession:

£460,000

### **VII.1.7) Name and address of the contractor/concessionaire**

Ove Arup & Partners

Scotstoun House, South Queensferry, West Lothian

Edinburgh

EH30 9SE

Telephone

+44 1313193027

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor/concessionaire is an SME

No

## **VII.2) Information about modifications**

### **VII.2.1) Description of the modifications**

Nature and extent of the modifications (with indication of possible earlier changes to the contract):

The value of the original appointment was GBP339,670 which was based on an assumption



of a number of applications. Subsequently 44 applications were received which was in excess of the numbers assumed. As a result, there will require to be additional resource allocated to exceed this requirement.

### **VII.2.2) Reasons for modification**

Need for modification brought about by circumstances which a diligent contracting authority/entity could not foresee.

Description of the circumstances which rendered the modification necessary and explanation of the unforeseen nature of these circumstances:

The number of applications to the SIM process has exceeded applications and the resource required to evaluate the applications and provide project information to the SIM Group has increased. The level of the applications could not have been reasonably foreseen at the point of the competition being commenced, On the basis that the works involve the evaluation of a number of different applications, it would not be possible to split the services as it would lead to difficulties in relation to ensuring consistencies between two separate teams and ultimately would lead to increased and duplication of costs.

### **VII.2.3) Increase in price**

Updated total contract value before the modifications (taking into account possible earlier contract modifications, price adaptations and average inflation)

Value excluding VAT: £120,420

Total contract value after the modifications

Value excluding VAT: £460,000