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Tender

## **2700\_22 Estates Management Professional Services**

ESPO

F02: Contract notice

Notice identifier: 2021/S 000-032267

Procurement identifier (OCID): ocds-h6vhtk-02dc0e

Published 23 December 2021, 4:57pm

### **Section I: Contracting authority**

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

ESPO

Barnsdale Way, Grove Park, Enderby

Leicester

LE19 1ES

#### **Contact**

Place and Environment Procurement Team

#### **Email**

[tenders@espo.org](mailto:tenders@espo.org)

#### **Telephone**

+44 7880471970

#### **Country**

United Kingdom

**NUTS code**

UKF21 - Leicester

**Internet address(es)**

Main address

<http://www.espo.org/>

**I.2) Information about joint procurement**

The contract is awarded by a central purchasing body

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.eastmidstenders.org/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.eastmidstenders.org/>

**I.4) Type of the contracting authority**

Regional or local authority

**I.5) Main activity**

Other activity

Local Authority Services

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**Section II: Object**

**II.1) Scope of the procurement**

### **II.1.1) Title**

2700\_22 Estates Management Professional Services

Reference number

2700\_22 (ProContract internal Ref. DN559832)

### **II.1.2) Main CPV code**

- 70000000 - Real estate services

### **II.1.3) Type of contract**

Services

### **II.1.4) Short description**

A national framework agreement for the provision of estates management consultancy services relating to the use, management, acquisition, disposal and development of land and property, and associated services.

To tender: (a) Go to [www.eastmidstenders.org](http://www.eastmidstenders.org), (b) Register (c) Search for tender opportunity '2700\_22' d) Express an interest (e) Download the tender from the website.

### **II.1.5) Estimated total value**

Value excluding VAT: £160,000,000

### **II.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for all lots

## **II.2) Description**

### **II.2.1) Title**

Lot 1A - Fixed Asset Valuation

Lot No

1A

## **II.2.2) Additional CPV code(s)**

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

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

NUTS codes

- UK - United Kingdom

## **II.2.4) Description of the procurement**

The valuation services covered by the framework will comprise the full range of services under the Royal Institution of Chartered Surveyors valuation faculty.

## **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

## **II.2.6) Estimated value**

Value excluding VAT: £16,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

## **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

## Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

### **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 1B - Rating Valuation

Lot No

1B

### **II.2.2) Additional CPV code(s)**

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

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

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

The valuation services covered by the framework will comprise the full range of services under the Royal Institution of Chartered Surveyors valuation faculty.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £16,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 1C - General Valuation

Lot No

1C

#### **II.2.2) Additional CPV code(s)**

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

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

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

The valuation services covered by the framework will comprise the full range of services under the Royal Institution of Chartered Surveyors valuation faculty.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £16,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 2A - Commercial Agency

Lot No

2A

### **II.2.2) Additional CPV code(s)**

- 70122000 - Land sale or purchase services

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

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

The agency services covered by the framework will comprise acquisition and disposal of an interest in land on the open market.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £11,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 2B - Agricultural Agency

Lot No

2B

#### **II.2.2) Additional CPV code(s)**

- 70122000 - Land sale or purchase services

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

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

The agency services covered by the framework will comprise acquisition and disposal of an interest in land on the open market.

## **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

## **II.2.6) Estimated value**

Value excluding VAT: £11,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

## **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

## **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 - Lease Management

Lot No

3

### **II.2.2) Additional CPV code(s)**

- 70220000 - Non-residential property renting or leasing services

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

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

The lease management services covered under the framework will comprise advice on interim and market rents and negotiation of lease renewals and rent reviews for a commercial or agricultural setting.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £10,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 - Property/Estate Management

Lot No

4

#### **II.2.2) Additional CPV code(s)**

- 70332200 - Commercial property management services

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

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

A broad range of estates management services will be covered under the framework, including, but not limited to: day-to-day management of leased properties, including dealing with maintenance and repair issues, liaison with tenants, preparation of budgets, negotiation and documentation of tenancy agreements, advice on maximising revenue, and review of rents.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £20,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 5 - Strategic Asset Management and Development Consultancy

Lot No

5

#### **II.2.2) Additional CPV code(s)**

- 70110000 - Development services of real estate

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

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

This lot will cover services relating to the maximisation of value of individual and groups of properties within an urban or rural area.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £10,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

## **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 6 - Compulsory Purchase and Compensation

Lot No

6

### **II.2.2) Additional CPV code(s)**

- 70122000 - Land sale or purchase services

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

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

This lot will cover advice on all aspects of compensation claims.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £20,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

## **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

## **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 7 - Workplace and Workspace Management

Lot No

7

### **II.2.2) Additional CPV code(s)**

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

- 70332200 - Commercial property management services

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

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

This lot covers a broad range of estates management professional services in relation to workplace and workspace management, including:

- Building asset management and tracking
- Property performance management, analysis and reporting including expert analysis reports and any recommended corrective action
- Contingency planning and disaster recovery planning
- Smarter working and space management

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £10,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 8 - Planning Consultancy

Lot No

8

#### **II.2.2) Additional CPV code(s)**

- 71241000 - Feasibility study, advisory service, analysis
- 71400000 - Urban planning and landscape architectural services

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

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

This lot comprises services including, but not limited to:

- Obtaining planning approvals, including appeals
- Planning history reports

- Planning feasibility
- Enforcement
- Assessment of land use options
- Preparation of development briefs for informal Local Planning Authority Agreement
- Stakeholder consultations
- Monitoring consultations and attending committees
- LDF's representation and monitoring
- Pursing representations at inquiry stage
- Reviewing proposed modifications/adoption proceedings
- Advice and negotiation of Section 106 and Grampian conditions, including developer contributions
- Master planning
- Noise and sound sensitivity
- Site and ground surveys
- Conservation areas
- Environment assessments
- Flood risk assessments
- Topography and tree surveys
- Contamination
- Air quality testing
- Ecology
- Advice on strategic tree planting (location)
- Land quality

- Elements of the landscape

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £20,000,000

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

Start date

29 March 2022

End date

28 March 2024

This contract is subject to renewal

No

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The framework agreement has the option to extend for up to a further 24 months. The total estimated value stated in Section II.1.5 includes the option period.

#### **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 III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

All service providers will be required to confirm that all reports and recommendations will be approved by a member of the Royal Institution of Chartered Surveyors (Lots 1-7) or Royal Town Planning Institute (Lot 8), or a relevant professional body of equivalent standing.

#### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

#### **III.1.3) Technical and professional ability**

Selection criteria as stated in the procurement documents

### **III.2) Conditions related to the contract**

#### **III.2.2) Contract performance conditions**

ESPO shall monitor the financial stability of the awarded service providers during the period of the framework by reference to credit ratings agency reports. ESPO shall obtain a credit score for the service provider on or before the framework start date as a base score, and where a significant change in the credit score is identified over the life of the framework agreement, ESPO reserves the right to investigate the reasons for this significant change. Depending on the severity of the changes, it will be at the sole discretion of ESPO to suspend or even permanently remove the service provider from the framework agreement.

ESPO shall monitor the service providers' performance against the set framework KPIs including the delivery of social value to customers by reference to the social value reports prepared by the service providers and/or by the Social Value Portal on behalf of the service providers to ESPO and the customer.

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## 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

Framework agreement with several operators

In the case of framework agreements, provide justification for any duration exceeding 4 years:

#### 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: [2021/S 000-021663](#)

#### IV.2.2) Time limit for receipt of tenders or requests to participate

Date

27 January 2022

Local time

12:00pm

#### IV.2.4) Languages in which tenders or requests to participate may be submitted

English

#### IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 4 (from the date stated for receipt of tender)

#### **IV.2.7) Conditions for opening of tenders**

Date

27 January 2022

Local time

12:00pm

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.3) Additional information**

As a Central Purchasing Body as defined in the Public Contracts Regulations 2015, the Framework Agreement is open for use by Public Bodies (defined at <https://www.espo.org/amfile/file/download/file/9608/>) that also fall into one of the following classifications of user throughout all administrative regions of the UK: Local Authorities; Educational Establishments (including Academies); Central Government Departments and Agencies; Police, Fire & Rescue and Coastguard Emergency Services; NHS and HSC Bodies, including Ambulance Services; Registered Charities; Registered Social Landlords; The Corporate Office of the House of Lords, The Corporate Officer of the House of Commons; or any public body established by or under the Scotland Act 1998 or any Act of the Scottish Parliament. Details of the classification of end user establishments and geographical areas are available at: <https://www.espo.org/legal>

ESPO has established a commercial trading company, ESPO Trading Limited, whose target clients are third sector organisations such as national and local charities, public sector mutual organisations and other organisations involved in the delivery of services to or for the public sector. The successful Supplier may be asked to enter into an additional separate framework agreement (the Second Framework) with ESPO Trading Limited on materially similar terms to that found in the tender pack to be entered into by ESPO itself.

Any Second Framework agreement will be a purely commercial agreement and will, for the avoidance of doubt, not be governed by the Public Contract Regulations 2015 or other public procurement legislation. ESPO Trading Limited may enter into the second framework agreement with the successful supplier and make it available to third sector clients who themselves are not required to follow the Public Contracts Regulations 2015 or other public procurement legislation. Accordingly, this is provided for bidders'

information only.

An eAuction process may be used to award subsequent call off contracts following the reopening of competition among the parties to the Framework Agreement.

## **VI.4) Procedures for review**

### **VI.4.1) Review body**

The Royal Court of Justice

The Strand

London

WC2A 2LL

Country

United Kingdom

### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

ESPO will incorporate a minimum 10 calendar day standstill period at the point information on the award of the contract is communicated to tenderers. Applicants who are unsuccessful shall be informed by ESPO as soon as possible after the decision has been made as to the reasons why the applicant was unsuccessful. If an appeal regarding the award of the contract has not been successfully resolved, The Public Contracts Regulations 2015 (SI 2105 No. 102) provide for aggrieved parties who have been harmed or are at risk of harm by breach of the rules to take legal action. Any such action must be brought within the applicable limitation period. Where a contract has not been entered into, the Court may order the setting aside of the award decision or order for any document to be amended and may award damages, make a declaration of ineffectiveness, order for a fine to be paid, and/or order the duration of the contract be shortened. The purpose of the standstill period referred to above is to allow the parties to apply to the Courts to set aside the award decision before the contract is entered into.