

UK-London: project-management services other than for construction work

OJ S 52/2012 15/03/2012

Contract notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: National Heritage Memorial Fund

Postal address: 7 Holbein Place

Town: London

Postal code: SW1W 8NR

Country: United Kingdom

Contact person: Strategic Business Development Team

For the attention of: Yumna Zain

E-mail: ross2013monitor@hlf.org.uk

Telephone: +44 2075916023

Internet address(es):General address of the contracting authority: www.hlf.org.uk**Additional information can be obtained from:**

the abovementioned address

Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from:

the abovementioned address

Tenders or requests to participate must be submitted: the abovementioned address**I.2. Type of the contracting authority**

Body governed by public law

I.3. Main activity

Recreation, culture and religion

Other: Lottery money distributor for heritage and cultural projects

I.4. Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: no

Section II: Object of the contract

II.1. Description**II.1.1. Title attributed to the contract by the contracting authority**

National Heritage Memorial Fund - register of support services - project management monitors.

II.1.2. Type of contract and place of performance or delivery

Services

Service category No 27: Other services

Main site or place of performance: United Kingdom.

NUTS code UK United Kingdom

II.1.3. Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

II.1.4. Information about framework agreement

Framework agreement with a single operator

Duration of the framework agreement

Duration in months: 36

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

It is anticipated that the contract will be for an initial period of 36 months with options for the Contracting Authority to extend it for further periods of up to (in aggregate) 24 months.

Estimated total value of purchases for the entire duration of the framework agreement

Estimated value excluding VAT:

Range: between 2 000 000 and 10 000 000 GBP

II.1.5. Short description of the contract or purchase(s)

Background to HLF.

The Heritage Lottery Fund (HLF) distributes a share of funds raised by the National Lottery. Since 1994 we have awarded 4.7 billion GBP to 32 000 projects across the UK, ranging from major capital projects at iconic heritage sites to small education and community projects.

HLF is administered by the Trustees of the National Heritage Memorial Fund (NHMF) and gives grants to support a wide range of projects involving the local, regional and national heritage of the United Kingdom.

We distribute money raised to projects conserving our diverse heritage and helping people learn about and take an active part in it. Our definition of heritage is broad, including: historic buildings and townscapes; archaeological sites; museums and archives; natural and designed landscapes (including parks habitats and species) oral history, cultural traditions and local community heritage.

Information about HLF is at www.hlf.org.uk.

We need external specialists with appropriate knowledge, skills and experience to work as Monitors to help us monitor the delivery of the projects we fund.

The categories of specialist knowledge, skills and experience are:

1. Project management of capital/conservation projects involving heritage buildings (including those in use as for heritage purposes e.g. museums, archives, visitor attractions, or non-heritage uses e.g. places of worship, community spaces, theatres), monuments or heritage sites (including archaeological and industrial sites);
2. Project management of capital/conservation projects involving parks, designed landscapes or countryside;
3. Project management of capital/conservation projects involving ships/other vessels, vehicles or aircraft;
4. Project management of large and/or complex activity projects (i.e. projects not involving capital or conservation works) in any of the heritage areas listed above, including education and community projects;
5. Project management of large scale digital projects.

The work will vary from project to project, within the scope of the tasks outlined. The case officer is responsible for defining the detailed nature of each commission and for managing the monitoring budget. This will be defined by an assessment of the risks associated with each grant awarded.

Note: to register your interest in this notice and obtain any additional information please visit the myTenders web site at http://www.myTenders.org/Search/Search_Switch.aspx?ID=83970.

II.1.6. CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

II.1.7. Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: yes

II.1.8. Lots

This contract is divided into lots: yes

Tenders may be submitted for one or more lots

II.1.9. Information about variants

Variants will be accepted: no

II.2. Scope of the procurement

II.2.1. Total quantity or scope

Refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Estimated value excluding VAT:

Range: between 2 000 000 and 10 000 000 GBP

II.2.2. Information about options

Options: yes

Description of options: Extension of the contract from 36 months to 60 months.

Provisional timetable for recourse to these options:

in months: 36 (from the award of the contract)

II.2.3. Information about renewals

This contract is subject to renewal: yes

Number of possible renewals: Range: between 1 and 2

In the case of renewable supplies or service contracts, estimated timeframe for subsequent contracts:

in months: 36 (from the award of the contract)

II.3. Duration of the contract or time limit for completion

Start 1.4.2013. Completion 31.3.2016

Information about lots

Lot No: 01

Lot title: East of England Region

1) Short description

See short description of services in II.1.5 to be provided for the East of England Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 02

Lot title: East Midlands Region

1) Short description

See short description of services in II.1.5 to be provided for the East Midlands Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 03

Lot title: London Region

1) Short description

See short description of services in II.1.5 to be provided for the London Region.

2)

CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration**5) Additional information about lots**

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 04

Lot title: Northern Ireland

1) Short description

See short description of services in II.1.5 to be provided for Northern Ireland.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this country.

4) Indication about different time frame or duration**5) Additional information about lots**

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 05

Lot title: North East Region

1) Short description

See short description of services in II.1.5 to be provided for the North East Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 06

Lot title: North West Region.

1) Short description

See short description of services in II.1.5 to be provided for the North West Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 07

Lot title: Scotland

1) Short description

See short description of services in II.1.5 to be provided for Scotland.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 08

Lot title: South East Region

1) Short description

See short description of services in II.1.5 to be provided for the South East Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 79311000 Survey services, 71541000 Construction project management services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 09

Lot title: South West Region

1) Short description

See short description of services in II.1.5 to be provided for the South West Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 10

Lot title: Wales

1) Short description

See short description of services in II.1.5 to be provided for Wales.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 11

Lot title: West Midlands Region

1) Short description

See short description of services in II.1.5 to be provided for the West Midlands Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Lot No: 12

Lot title: Yorkshire and the Humber Region

1) Short description

See short description of services in II.1.5 to be provided for the Yorkshire and the Humber Region.

2) CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

3) Quantity or scope

It is envisaged that a minimum of 10 individuals will be needed to service this region.

4) Indication about different time frame or duration

5) Additional information about lots

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Section III: Legal, economic, financial and technical information

III.1. Conditions related to the contract

III.1.1. Deposits and guarantees required

Details will be in the invitation to tender.

III.1.2. Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them

As stated in the contract documentation.

III.1.3. Legal form to be taken by the group of economic operators to whom the contract is to be awarded

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

III.1.4. Contract performance conditions

The performance of the contract is subject to particular conditions: no

III.2. Conditions for participation

III.2.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions: Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

Submission of the pre-qualification questionnaire acts as the request to participate. The Contracting Authority reserves the right to refuse to consider any incomplete questionnaire or one that is not submitted according to the requirements of that questionnaire.

III.2.2. Economic and financial ability

List and brief description of conditions: Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

III.2.3. Technical and professional ability

List and brief description of conditions:

Please refer to the pre-qualification questionnaire on our web site at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 monitor pre-qualification questionnaire". You should also read the "ROSS 2013 Tender alert e-mail" also found in the "Tenders" section.

III.2.4. Information about reserved contracts

III.3. Conditions specific to services contracts

III.3.1. Information about a particular profession

III.3.2. Information about staff responsible for the performance of the contract

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract: yes

Section IV: Procedure

IV.1. Type of procedure

IV.1.1. Type of procedure

Restricted

IV.1.2. Information about the limits on the number of candidates to be invited

Envisaged minimum number 5

Objective criteria for choosing the limited number of candidates: Sufficient required to allow for choice up to a maximum of those that pass our initial pre-qualification questionnaire criteria. We are uncertain with respect to the number of projects; heritage sectors they fall under and risk.

IV.1.3. Information about reduction of the number of solutions or tenders during negotiation or dialogue

IV.2. Award criteria

IV.2.1. Award criteria

The most economically advantageous tender in terms of Price is not the only award criterion and all criteria are stated only in the procurement documents

IV.2.2. Information about electronic auction

An electronic auction will be used: no

IV.3. Administrative information

IV.3.1. File reference number attributed by the contracting authority

83970

IV.3.2. Previous publication concerning this procedure

IV.3.3. Conditions for obtaining specifications and additional documents or descriptive document

IV.3.4. Time limit for receipt of tenders or requests to participate

30.4.2012 - 10:00

IV.3.5. Estimated date of dispatch of invitations to tender or to participate to selected candidates

15.8.2012

IV.3.6. Languages in which tenders or requests to participate may be submitted

English.

Other: Welsh.

IV.3.7. Minimum time frame during which the tenderer must maintain the tender

IV.3.8. Conditions for opening of tenders

Section VI: Complementary information

VI.1. Information about recurrence

VI.2. Information about European Union funds

VI.3. Additional information

Organisation: National Heritage Memorial Fund.

For the attention of: Yumna Zain.

Address: Heritage Lottery Fund, 7 Holbein Place.

Postal code: SW1W 8NR.

Town: London.

Country: United Kingdom.

Electronic mail (e-mail): ross2013monitor@hlf.org.uk.

Internet address: <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>.

This procurement is independent of, and separate from, other procurements by the National Heritage Memorial Fund.

A "Frequently Asked Questions" spreadsheet will periodically be published on the above web site under the tender section.

(MT Ref:83970).

VI.4. Procedures for review

VI.4.1. Review body

VI.4.2. Review procedure

VI.4.3. Service from which information about the review procedure may be obtained

VI.5. Date of dispatch of this notice

14.3.2012