

**United Kingdom-Belfast: Financial and insurance services**  
**OJ S 92/2020 12/05/2020**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: Strategic Investment Board  
Postal address: 9 Lanyon Place  
Town: Belfast  
NUTS code: UK United Kingdom  
Postal code: BT1 3LP  
Country: United Kingdom  
Contact person: ssdadmin.CPDfinance-ni.gov.uk  
E-mail: [ssdadmin.CPD@finance-ni.gov.uk](mailto:ssdadmin.CPD@finance-ni.gov.uk)  
**Internet address(es):**  
Main address: <https://etendersni.gov.uk/epps>  
Address of the buyer profile: <https://etendersni.gov.uk/epps>

**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://etendersni.gov.uk/epps>  
Additional information can be obtained from the abovementioned address  
Tenders or requests to participate must be submitted electronically via: <https://etendersni.gov.uk/epps>  
Tenders or requests to participate must be submitted to the abovementioned address

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

Body governed by public law

**I.5. Main activity**

General public services

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**Section II: Object**

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

**II.1.1. Title**

NI Public Sector Asset Management Professional Services Framework 2020  
Reference number: 2346483

**II.1.2. Main CPV code**

66000000 Financial and insurance services

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

Services

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic Asset Management Professional Advisory Services (multi-disciplinary);

Lot 2: Financial, Economic and Commercial Professional Advisory Services;

Lot 3: Integrated Surveying Professional Advisory Services (multiple RICS sector pathways);

Lot 4: Commercial Real-estate and Associated Professional Advisory Services (single RICS sector pathway);

Lot 5: Building Surveying and Associated Professional Advisory Services (single RICS sector pathway);

Lot 6: Place Shaping and Value Creation.

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

Value excluding VAT: 10 000 000,00 GBP

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

This contract is divided into lots: yes

Tenders may be submitted for maximum number of lots: 6

## **II.2. Description**

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

Lot 1: Strategic Asset Management Professional Advisory Services (Multi-disciplinary)

Lot No: 1

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200 Commercial property management services, 70332000 Non-residential property services, 79412000 Financial management consultancy services

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

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);

Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);

Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);

Lot 6: Place shaping and value creation.

### **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: 2 500 000,00 GBP

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

Duration in months: 24

This contract is subject to renewal: yes

Description of renewals:

The initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

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

Variants will be accepted: no

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

Options: yes

Description of options:

The initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

### **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**

The estimated potential range of spend in this lot is GBP 2.0 m to GBP 2.5 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

## **II.2. Description**

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

Lot 2: Financial, Economic and Commercial Professional Advisory Services

Lot No: 2

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200 Commercial property management services, 70332000 Non-residential property services, 79412000 Financial management consultancy services

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

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);  
Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);  
Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);  
Lot 6: Place shaping and value creation.

**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: 2 000 000,00 GBP

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

Duration in months: 24

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 initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

**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**

The estimated potential range of spend in this lot is GBP 1.5 m to GBP 2 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

**II.2. Description**

**II.2.1. Title**

Lot 3: Integrated Surveying Professional Advisory Services (Multiple RICS Sector Pathways)  
Lot No: 3

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200 Commercial property management services, 70332000 Non-residential property services, 79412000 Financial management consultancy services

**II.2.3. Place of performance**

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework

agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);

Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);

Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);

Lot 6: Place shaping and value creation.

#### **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: 1 500 000,00 GBP

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

Duration in months: 24

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 initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

#### **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**

The estimated potential range of spend in this lot is GBP 1.0 m to GBP 1.5 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

### **II.2. Description**

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

Lot 4: Commercial Real-estate and Associated Professional Advisory Services (Single RICS Sector Pathway)

Lot No: 4

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200 Commercial property management services, 70332000 Non-residential property services, 79412000 Financial management consultancy services

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

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Limited Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);

Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);

Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);

Lot 6: Place shaping and value creation.

#### **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: 1 000 000,00 GBP

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

Duration in months: 24

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 initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

#### **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**

The estimated potential range of spend in this Lot is GBP 0.5 m to GBP 1.0 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

### **II.2. Description**

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

Lot 5: Building Surveying and Associated Professional Advisory Services (Single RICS Sector Pathway)

Lot No: 5

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200

Commercial property management services, 70332000 Non-residential property services,  
79412000 Financial management consultancy services

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

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);

Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);

Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);

Lot 6: Place shaping and value creation.

### **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: 1 000 000,00 GBP

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

Duration in months: 24

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 initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

### **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**

The estimated potential range of spend in this lot is GBP 0.5 m to GBP 1.0 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

## **II.2. Description**

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

Lot 6: Place Shaping and Value Creation

Lot No: 6

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

70000000 Real estate services, 66100000 Banking and investment services, 70332200 Commercial property management services, 70332000 Non-residential property services, 79412000 Financial management consultancy services

**II.2.3. Place of performance**

NUTS code: UKN0 Northern Ireland

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

The Strategic Investment Board Ltd Asset Management Unit (AMU) provides expert advice to Departments on all matters relating to the management of their land, property and infrastructure assets. To support this advisory service, AMU wishes to establish a framework agreement of professional services providers. The framework agreement will comprise of six separate lots as follows:

Lot 1: Strategic asset management professional advisory services (multi-disciplinary);

Lot 2: Financial, economic and commercial professional advisory services;

Lot 3: Integrated surveying professional advisory services (multiple RICS sector pathways);

Lot 4: Commercial real-estate and associated professional advisory services (single RICS sector pathway);

Lot 5: Building surveying and associated professional advisory services (single RICS sector pathway);

Lot 6: Place shaping and value creation.

**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: 2 000 000,00 GBP

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

Duration in months: 24

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 initial contract period is 2 years from the date of award. There is a potential for two further extensions of 1 year.

**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**

The estimated potential range of spend in this Lot is GBP 1.5 m to GBP 2 m. Please note that the estimated values provided do not represent a guarantee of or exclusivity of work or volume of work. Actual spend on the framework may vary depending on demand.

## Section III: Legal, economic, financial and technical information

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### 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:  
As per tender documentation.

#### 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

As per tender documentation.

## Section IV: Procedure

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### 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  
Envisaged maximum number of participants to the framework agreement: 30

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

Date: 07/08/2020 Local time: 15:00

#### IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates

#### 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

Tender must be valid until: 05/11/2020

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

Date: 07/08/2020 Local time: 15:30

## Section VI: Complementary information

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### VI.1.

## **Information about recurrence**

This is a recurrent procurement: no

### **VI.2. Information about electronic workflows**

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

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

Contracting authorities/bodies party to framework: The Executive Office, Dept of Agriculture Env and Rural Affairs, Dept for Communities, Dept of Education, Dept for the Economy, Dept of Finance, LPS. Dept for Infrastructure, Dept of Health, Dept of Justice, NI Courts and Tribunals Service, Youth Justice Agency, Armagh Observatory and Planetarium, Arts Council NI, Belfast Health and Social Care Trust, Belfast Metropolitan College, Business Services Organisation, Charity Commission for NI, Commissioner for Children and Young People NI, Commissioner for Older People for NI, Community Relations Council, Education Authority for NI, Equality Commission for NI, Health and Social Care Board, Invest NI, Labour Relations Agency, Maze Long Kesh Development Corporation, National Museums NI, North West Regional College, Northern Health and Social Care Trust, NI Ambulance Service, NI Audit Office, NI Council for Integrated Education, NI Fire and Rescue Service, NI Housing Executive, NI Local Government Officers' Superannuation Committee, NI Tourist Board (Tourism NI), NI Water, Northern Regional College, Police Ombudsman NI, Police Service of NI, Probation Board NI, Queens University, Regulation and Quality Improvement Authority. Social Enterprises NI, South Eastern Health and Social Care Trust, South Eastern Regional College, South West College, Southern Health and Social Care Trust, Southern Regional College, Sport NI, Stranmillis University College, Strategic Investment Board, Translink, Ulster Supported Employment Ltd, Ulster University, Western Health and Social Care Trust, Antrim and Newtownabbey Borough Council, Ards and N.Down Borough Council, Armagh City Banbridge and Craigavon Borough Council, Belfast City Council, Causeway Coast and Glens Borough Council, Derry City and Strabane District Council, Fermanagh and Omagh District Council, Lisburn and Castlereagh City Council, Mid and East Antrim Borough Council, Mid Ulster District Council, Newry, Mourne and Down District Council, Foras na Gaeilge, Ulster Scots Agency.

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

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

Official name: The UK does not have any special review body with responsibility for appeal /mediation procedures in public procurement competitions. Instead; any challenges are dealt with by the High Court, Commercial Division, to which proceedings may be issued regarding alleged breaches of the Public Contracts Re

Town: n/a

Country: United Kingdom

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

Precise information on deadline(s) for review procedures:

CPD will comply with the Public Contracts Regulations 2015 and, where appropriate, will incorporate a standstill period (i.e. a minimum of 10 calendar days) at the point information on the award of contract is communicated to tenderers. That notification will provide full information on the award decision. This provides time for the unsuccessful tenderers to challenge the award decision before the contract is entered into.

**VI.5. Date of dispatch of this notice**

07/05/2020