



## Invitation to Tender (ITT)

### Brief on the Preparation of a Conservation Management Plan for HMS Trincomalee and Jackson Dock

First Issued: May 2018

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## 1. Summary Instructions and Details of Contract

SUBJECT	DETAILS
<b>Contract Description</b>	A contract for the preparation of a Conservation Management Plan for HMS Trincomalee and Jackson Dock (For Specification on the Scope of Work and Deliverables see Annex 1)
<b>Programme</b>	To be completed as part of a programme to develop a long term maintenance and management strategy for the ship and dock and to support applications for future funding in areas of conservation, restoration, preservation and public display.
<b>NMRN Contact during tender period</b>	Clarifications and enquiries during the tender process can be sent to <a href="mailto:HST.procurement@nmrn.org.uk">HST.procurement@nmrn.org.uk</a> . Please note that this email address is different to the submission email.
<b>Date of Tender Return</b>	Midday, 21 June 2018 Tenders must be submitted to <a href="mailto:tenders@nmrn.org.uk">tenders@nmrn.org.uk</a>
<b>Content for Submission</b>	Content requirements for tender returns are listed in Annex 2 of this ITT.
<b>Last date for Clarifications</b>	Midday 11 June 2018
<b>Annexes</b>	<b>Annex 1 – Tender Specification</b> <b>Annex 2 – Supplier Response Documents</b> <b>Annex 3 – Pricing Approach</b> <b>Annex 4 – Tender Conditions &amp; Contractual Requirements</b> <b>Annex 5 – Terms and Conditions of Contract (separate document)</b>

## 2. Company Overview

2.1 The National Museum of the Royal Navy (NMRN) spans a number of Museums across the UK, detailing the past, present and future of the Royal Navy. The Museum boasts the largest fleet of historic vessels in the world, the most well-known being HMS Victory, HMS Caroline, HMS Trincomalee and HMS Alliance. These ships are managed and cared for by the Historic Ships and Heritage Directorate who promote Heritage Best Practice in the conservation and care of historic vessels.

## 3. Project Introduction & Overview

3.1 HMS Trincomalee was launched in 1817 and is a surviving example of a classic British frigate and recognised as part of the Core Collection of vessels on the Historic Ships Register. The vessel is owned and maintained by the National Museum of the Royal Navy and in 2014 was integrated within the Museum's fleet of ships alongside HMS Victory, HMS M.33, HMS Alliance and HMS Caroline. In 2016 the site and ship moved under the name National Museum of the Royal Navy, Hartlepool. The ship is the focal point within Hartlepool's Historic Quay attraction and is berthed at the former graving dock of Jackson Dock in Hartlepool, where she was restored in the 1990s. Jackson Dock opened in 1852 and is named after Stockton on Tees solicitor, Ralph Ward Jackson, who established the West Hartlepool Dock Company. Trincomalee serves as a significant historic naval attraction to England's North East. A framework is therefore necessary for understanding, managing and communicating the heritage of Trincomalee and the site for the National Museum of the Royal Navy.

3.2 In response to this, the NMRN want to commission the preparation of a Conservation Management Plan which will act as a working document for the future care and management of the vessel and site.

3.3 The purpose and scope of this ITT and its supporting documents is to explain in further detail the requirements of the NMRN and the procurement process for submitting a tender proposal.

## 4. Tender Process ("Procurement Process")

This section explains the Procurement Process for tenderers before the submission deadline and the evaluation of tenders after submission. Further information on Tender Conditions & Contractual Requirements are found in Annex 4 and must be read before submission.

### 4.1 Applying before the Submission Deadline

#### 4.1.1 Work Specification

The NMRN wishes to appoint a contractor to undertake the preparation of a Conservation Management Plan for HMS Trincomalee and Jackson Dock

For a full, detailed specification of the services required refer to Annex 1.

#### 4.1.2 Key background documents

The consultant should consider the following documents available from the National Museum of the Royal Navy;

- Three Quays Marine Services & Broadway Malyan Cultural Heritage, 1999. *A Conservation Plan for HMS Trincomalee*. September 1999.
- Lambert, A., 2002. *Trincomalee; The Last of Nelson's Frigates*. London; Chatham Publishing.

- Roberts, B, 2017. *When HMS Trincomalee was “Foudroyant”: Youth training and the preservation of heritage aboard Hartlepool’s Historic Ship, c.1897-1990*. Papers in North East History, 2017
- Hunt, C. (being prepared in 2018) Primary documentary research papers for: *Design, Construction & Modification (1812-1897); TS Foudroyant Modifications & Repair (1897-1986); Restoration (1986-2016); Maiden Voyage, Bombay to Portsmouth (1818-1819); 1<sup>st</sup> Commission (1847-1850), 2<sup>nd</sup> Commission (1852-1857); RN Crew & Careers of Note; Jackson Dock, Hartlepool*
- HMS Trincomalee Trust archive.
- Inventory of Collections associated with HMS Trincomalee held by NMRN

Consultations and site visits are available for contractors before tender submission. Please contact [HST.Procurement@NMRN.org.uk](mailto:HST.Procurement@NMRN.org.uk) to arrange.

#### 4.1.3 Timescales

Subject to any changes notified to potential suppliers by the NMRN in accordance with the Tender Conditions, the following timescales shall apply to this Procurement Process:

Activity	Date / time
Issue of Contract Notice / availability of ITT documents	21 May 2018
Deadline for clarification questions (Clarification Deadline)	Midday 11 June 2018
Deadline for submission of ITT responses by potential suppliers (Tender Response Deadline)	midday 21 June 2018
Award decision standstill letters issued	5 July 2018
Contract concluded with winning supplier	16 July 2018
Contract start date	17 July 2018

## 4.2. Instructions for Submitting Tenders

4.2.1 The documents that must be submitted to form your tender response are listed in Annex 2 (Supplier Response) to this ITT.

4.2.2 Tender submissions must be sent to [tenders@nmrn.org.uk](mailto:tenders@nmrn.org.uk) before the submission deadline.

4.2.3 The following requirements should be complied with when submitting your response to this ITT:

- Please ensure that you send your submission in good time to prevent issues with technology – late tender responses may be rejected by the NMRN.
- Please ensure that information provided as part of your response is of sufficient quality and detail that an informed assessment of it can be made by the NMRN.
- Do not submit any additional supporting documentation with your ITT response except where specifically requested to do so as part of this ITT. PDF, JPG, PPT, Word and Excel formats can be used for any additional supporting documentation (other formats should not be used without the prior written approval of the NMRN).
- All attachments/supporting documentation should be provided separately to your main tender response and clearly labelled to make it clear as to which part of your tender response it relates.

- If you submit a generic policy / document you must indicate the page and paragraph reference that is relevant to a particular part of your tender response.
- Unless otherwise stated as part of this ITT or its Annexes, all tender responses should be in the format of the relevant NMRN requirement with your response to that requirement inserted underneath.
- Where supporting evidence is requested as 'or equivalent' – you must demonstrate such equivalence as part of your tender response.
- Any deliberate alteration of an NMRN requirement as part of your tender response will invalidate your tender response to that requirement and for evaluation purposes you shall be deemed not to have responded to that particular requirement.
- Responses should be concise, unambiguous, and should directly address the requirement stated.
- Your tender responses to the tender requirements and pricing will be incorporated into the Contract, as appropriate.

#### **4.3. Clarification Requests**

4.3.1 All clarification requests should be submitted to [HST.Procurement@NMRN.org.uk](mailto:HST.Procurement@NMRN.org.uk) by the Clarification Deadline, as set out in the Timescales section of this ITT. The NMRN is under no obligation to respond to clarification requests received after the Clarification Deadline.

4.3.2 Any clarification requests should clearly reference the appropriate paragraph in the ITT documentation and, to the extent possible, should be aggregated rather than sent individually.

4.3.3 The NMRN reserves the right to issue any clarification request made by you, and the response, to all potential suppliers unless you expressly require it to be kept confidential at the time the request is made. If the NMRN considers the contents of the request not to be confidential, it will inform you and you will have the opportunity to withdraw the clarification query prior to the NMRN responding to all potential suppliers.

4.3.4 The NMRN may at any time request further information from potential suppliers to verify or clarify any aspects of their tender response or other information they may have provided. Should you not provide supplementary information or clarifications to the NMRN by any deadline notified to you, your tender response may be rejected in full and you may be disqualified from this Procurement Process.

#### **4.4. Evaluation Criteria**

4.4.1 You will have your tender response evaluated as set out below:

**Stage 1:** Tender responses will be checked to ensure that they have been completed correctly and all necessary information has been provided. Tender responses correctly completed with all relevant information being provided will proceed to Stage 2. Any tender responses not correctly completed in accordance with the requirements of this ITT and/or containing omissions may be rejected at this point. Where a tender response is rejected at this point it will automatically be disqualified and will not be further evaluated.

**Stage 2:** If a bidder succeeds in passing Stage 1 of the evaluation, then it will have its detailed tender response to the NMRN's requirements evaluated in accordance with the evaluation methodology set out below.

4.4.2 Award Criteria – Responses from potential suppliers will be assessed to determine the most economically advantageous tender using the following criteria and weightings and will be assessed entirely on your response submitted:

Criteria	Weighting
Quality of Method & Approach	70%
Commercial/ Value for Money	30%

4.4.3 Scoring Model – Tender responses will be subject to an initial review at the start of Stage 2 of the evaluation process. Any tender responses not meeting mandatory requirements or constraints (if any) will be rejected in full at this point and will not be assessed or scored further. Tender responses not so rejected will be scored by an evaluation panel appointed by the NMRN for all criteria other than Commercial using the following scoring model:

Points	Interpretation
<b>0</b>	Very Poor (does not meet any of the requirement) or Very High/Extreme Risk The response is significantly below what would be expected because of one or all of the following: <ul style="list-style-type: none"> <li>• The response indicates a significant lack of understanding</li> <li>• The response fails to meet the requirement</li> </ul>
<b>1</b>	Poor (meets some of the requirement) or Above Average/High Risk The response meets elements of the requirement but gives concern in a number of significant areas. There are reservations because of one or all of the following: <ul style="list-style-type: none"> <li>• There is at least one significant issue needing considerable attention</li> <li>• There is insufficient evidence to demonstrate competence or understanding</li> <li>• The response is light and unconvincing</li> </ul>
<b>4</b>	Fair (meets most, but not all the requirement) or Average Risk The response meets most of the requirement, but there is a least one significant issue of concern or several smaller issues. These would require some further clarification or attention later in the procurement process and may arise through lack of demonstrated capability and/or appropriate evidence. The response therefore shows: <ul style="list-style-type: none"> <li>• Basic understanding of the requirements</li> <li>• Sufficient competence demonstrated through relevant experience</li> <li>• Some areas of concern that require attention</li> </ul>
<b>7</b>	Good (meets the requirement) or Low Risk The response broadly meets what is expected for the criteria. There are no significant areas of concern, although there might be limited minor issues that need further exploration or attention later in the procurement process. The response therefore shows: <ul style="list-style-type: none"> <li>• Good understanding of the requirements</li> <li>• Sufficient competence demonstrated through relevant experience</li> <li>• Some insight demonstrated into the relevant issues.</li> </ul>

<b>9</b>	<p>Very Good (exceeds the requirement) or Very Low Risk</p> <p>The response exceeds what is expected for the criteria. Leave no doubt as to the capability and commitment to deliver what is required. The response therefore shows:</p> <ul style="list-style-type: none"> <li>• Very good understanding of the requirement</li> <li>• Considerable competence demonstrated through relevant experience</li> <li>• Considerable insight into the relevant issues</li> </ul> <p>The response is also likely to propose additional value in several respects above that expected</p>
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4.4.4 Quality & Method of Approach Evaluation – The Quality & Method of Approach will be evaluated using the following criteria by the evaluation panel:

- Relevant skills and experience – Experience in writing Conservation Management Plans for historic wooden vessels is desirable.
- Understanding of the Brief
- Quality of Method Statement and Approach.

4.4.4 Commercial Evaluation – Your “Overall Price” (as calculated in accordance with requirements of Annex 2 (Pricing Approach) for the goods and/or services will be evaluated by the evaluation panel for the purposes of the commercial evaluation. Prices must not be subject to any pricing assumptions, qualifications or indexation not provided for explicitly by the NMRN as part of the pricing approach. In the event that any prices are expressed as being subject to any pricing assumptions, qualifications or indexation not provided for by the NMRN as part of the pricing approach, the NMRN may reject the full tender response at this point. The NMRN may also reject any tender response where the Overall Price for the goods and/or services is considered by the NMRN to be abnormally low following the relevant processes set out under the EU procurement rules. A maximum offer score will be awarded to the tender response offering the lowest “Overall Price”.

4.4.5 Moderation and application of weightings – The evaluation panel appointed for this procurement will meet to agree and moderate scores for each award criteria. Final scores in terms of a percentage of the overall tender score will be obtained by applying the relevant weighting factors set out as part of the award criteria table above. The percentage scores for each award criteria will be amalgamated to give a percentage score out of 100.

4.4.6 The winning tender response – The winning tender response shall be the tender response scoring the highest percentage score out of 100 when applying the above evaluation methodology

## Annex 1 - Tender Specification

The following sets out a full, detailed specification of the services required by the potential supplier as part of this ITT.

### 1. Scope of Work

The preparation of a Conservation Management Plan for HMS Trincomalee and Jackson Dock

### 2. Deliverables

#### 2.1 Understanding the Heritage

##### 2.1.1 General Understanding

The potential consultant will be expected to understand the heritage of the vessel and Jackson Dock and how they have developed over time. The CMP shall include;

- Research into primary sources for details of the ship's construction and the in-service/out of service refit and repair
- A timeline demonstrating the development of the ship and the Dock
- Series of phase plans showing the development of the vessel
- Consult relevant stakeholder organisations where applicable. The organisations include but are not limited to The National Museum of the Royal Navy, National Historic Ships UK.
- Prepare full measured survey of the ship, including an inventory identifying individual elements of the ship, their significance and management issues during conservation.

##### 2.1.2 Management Information

The potential consultant is expected to provide a summary of the ship and dock's management requirements, excluding the dam board of the Dock. The consultant should collect copies and summarise the main points of information from:

- Condition Surveys
- Repair/conservation history – summary of previous actions and reports on repairs, conservation, restoration and development.
- Current management requirements and standards that need to be met (H & S, access, environment)
- Relevant planning policy documents, including copies of any relevant legal documents for the vessel and the site it resides in which may affect future care and conservation

##### 2.1.3 Field Survey, Gazetteer & Inventory

The potential consultant will provide a detailed gazetteer and inventory of the elements of the asset with the CMP. The inventory or survey will combine information about all the different types of heritage

supplemented with background research. It will involve fieldwork to identify the elements and areas of heritage. The entry of each element should at least include:

- The history (from documentary sources)
- A description of what survives
- Significance
- Management issues, including condition
- Sources (with reference to any relevant reports or information)

Elements will be set out as an MS Access database and be numbered, photographed and related to base drawings.

## 2.2 Assessing Significance

### 2.2.1 Statement of Significance

A Statement of Significance is required for the vessel and dock.

The statement of significance should;

- Set out how the assets are significant and to whom
- Provide further detailed information on the significance of the whole or parts of the assets to aid day-to-day management
- Give detailed information on how the assets have been modified over time
- Give statement on how and on what basis the assessment of significance has been prepared, and who has been involved or consulted during its preparation

Guidance on writing a Statement of Significance can be found in ***Conserving Historic Vessels***, National Historic Ships (2010), ***Conservation Principles, Policies & Guidance***, Historic England (2008).

The consultant should include the following areas of significance:

- History of the ship's building and strategy
- Technological development
- The ship's construction, modification, repair and conservation
- Service career
- Post-service career
- Transfer to the NMRN and present day setting

### 2.2.2 Risks to Significance

The consultant should provide a clear statement of how and why the significance of the assets is vulnerable in the short and long-term.

### 2.2.3 Opportunities for Significance

The consultant should identify opportunities to enhance the significance of the assets.

Specific issues include;

- The experience and involvement of staff and volunteers in the conservation and maintenance of the vessel
- The experience and involvement of staff and volunteers in the interpretation of the vessel and dock
- The NMRN's target to increase visitor numbers at its Museum sites considering the location of Trincomalee and the impact of increased numbers on visitor safety and the historic fabric
- The relationship of Trincomalee within the timeline and technological developments of HMS Victory
- Trincomalee's modifications and changing roles, resulting in her survival.

## 2.3 **Conservation Management Aims**

2.3.1 The potential consultant will work with the NMRN to produce a set of tailored management policies for the future care of the vessel.

2.3.2 Complying with best-practise in conserving historic vessels – ***Conserving Historic Vessels***, National Historic Ships (2010), ***Conservation Principles, Policies & Guidance***, Historic England (2008)

2.3.3 The specific areas to develop within this section include;

- Comprehensive schedule of inspection and maintenance of the vessel and Dock, excluding the dam board
- Procedures for identifying, performing and proposing maintenance. Consideration should be given to access and H & S
- Proposals for safeguarding the historic fabric of the vessel during maintenance Comprehensive schedule of inspection for the ship and the dock
- Procedures for identifying, performing and proposing maintenance on the ship
- Proposals for improving the internal environment of the ship
- The impact of the external environment on the historic fabric and proposals for improvement

## 2.4 **Costed Action Plan**

2.4.1 The consultant will provide a 10 year costed action plan for the maintenance and management of the vessel

2.4.2 The action plan should include;

- Arrangements for inspecting the asset each year

- Detailed list of items to be inspected and maintained, including immediate, yearly and longer-term)
- Schedule of work
- Costs and resources for management and maintenance
- Persons responsible for the work
- Arrangements for continuing ongoing management and maintenance

### 3. Additional Requirements

#### 3.1 Skills

3.1.1 The project team must be headed by a lead consultant with expertise in leading and creating Conservation Management Plans

3.1.2 The lead consultant should detail how they have or will obtain access to expertise in:

- Historic timber ships/vessels
- Historic structures
- Planning conservation management
- Historic research
- Conservation surveying

3.1.3 A statement must be provided detailing how the potential consultant intends to draw historical material together and develop conservation approaches for the CMP.

3.1.4 All labour must supply proof of qualifications to perform their job role as specified within the tender proposal. These qualifications must be to sector quality standards.

#### 3.2 Stakeholder Consultations

3.2.1 Stakeholders should be involved in the CMP through a managed programme of involvement and consultation.

3.2.2 The following individuals, groups and organisation have been identified as stakeholders to this CMP:

- People who are currently or who have previously been directly involved in caring for the asset – NMRN onsite staff and sub-contractors
- Users – NMRN, visitors
- Wider Interest Groups – The Friends of HMS Trincomalee, Portsmouth Historic Dockyard, The Unicorn Preservation Society, Society for Nautical Research, National Maritime Museum, National Historic Ships UK.

3.2.3 A statement of how the potential consultant will manage stakeholder partnerships must be provided. Methods can include; conservation statement workshops, consultations on written drafts, interviews and exhibitions and open meetings

### 3.3. Design & Publication

3.3.1 The potential consultant will make arrangements for the final publication of the document.

3.3.2 The CMPs design and layout should match the NMRN's house style. An example of HMS Victory's CMP can be provided for reference.

3.3.3 On publication the consultant will provide:

- Camera-ready text
- 20 copies of the main text and 10 copies of the appendices
- 5 copies on CD-ROM
- Text & images that are suitable for loading onto a website

3.3.4 The hard copy will be A4 with photographs and illustrations set within the text. Reduced copies of maps and plans should be given in the text with full-size copies of maps, plans and drawings provided on a stable medium. The element inventory and other supporting information should be provided in bound appendices.

### 3.4 Materials Supplied by the Consultant

3.4.1 All materials, equipment and tools used by the consultant in the preparation of the CMP, including during the surveys of the vessels, are to be provided by the consultant

3.4.2 All materials and equipment used by the supplier or their subcontractors must comply with IOSH best practice in H & S standards.

#### 3.5.1 Heritage Best-Practice

3.5.1 The NMRN require all contractors and sub-contractors as part of this work to be aware of and comply with heritage best-practise when working on and around the vessels. Guidance on heritage best-practise can be found at <https://historicengland.org.uk/images-books/publications/conservation-principles-sustainable-management-historic-environment/> (Historic England 2008). Specific best-practise on historic vessels is set out by National Historic Ships in *Conserving Historic Vessels* (2010)

### 3.6 Safe Access

3.6.1 HMS Trincomalee is permanently moored at Jackson Dock, Hartlepool with safe and easy access

3.6.2 The vessel is open to the visiting public 7 days a week. Any work on board the ship likely to cause disturbance or reduced access to visitors should take place before opening hours (10.00, April – Oct, 11.00, Nov – March)

3.6.3 Confined Space Training and Working at Height is required when surveying the vessel

## Annex 2 – Supplier Response

### Part 1: Checklist

Below is a checklist of the desired content of the tender response to this ITT, in reference to the Specification in Annex 1:

Ref	Content	Ref	Detail	✓
1	CVs & Qual.s	1.1	The professional skills and qualifications of people involved in the project, including the names and CV's of proposed team members, their specific responsibilities and any arrangements for subcontracting.	<input type="checkbox"/>
		1.2	Description of how the lead consultant will seek expertise in the specialisms as stated in 3.1.2 Annex 1	<input type="checkbox"/>
2	Methods	2.1	Specify how the potential supplier will go about planning and executing the referenced tasks 2.1 – 2.4 within the Deliverables set out in Annex 1, namely;	<input type="checkbox"/>
		2.2	Understanding the Heritage – General Understanding	<input type="checkbox"/>
		2.3	Understanding the Heritage – Management Information	<input type="checkbox"/>
		2.4	Understanding the Heritage – Field Survey, Gazetteer & Inventory	<input type="checkbox"/>
		2.5	Assessing Significance – Statement of Significance	<input type="checkbox"/>
		2.6	Assessing Significance – Risks to Significance	<input type="checkbox"/>
		2.7	Assessing Significance – Opportunities for Significance	<input type="checkbox"/>
		2.8	Conservation management Aims – List of as policies	<input type="checkbox"/>
		2.9	Costed Action Plan – 10 years	<input type="checkbox"/>
3	H & S	3.1	How the contractor aims to comply with H & S IOSH standards. Please provide detailed description of your method for each deliverable (2.1 – 2.4, Annex 1), together with a template of a Risk Assessment.	<input type="checkbox"/>
		3.2	Provide relevant H & S Qualifications, such as First Aid, Confined Space Training and Working at Height.	<input type="checkbox"/>
4	Heritage Best-Practise	4.1	How the consultant will exercise conservation best practise (NHS; 2010, Historic England; 2008), including but not limited to mitigating risk of damage to the vessel during survey	<input type="checkbox"/>
5	Schedule d Work Programme	5.1	Scheduled work programme (in days) for all stages of the work with milestones and dates, including but not limited to; RAMS, Exclusion Zones & Consultations	<input type="checkbox"/>
		5.2	The programme for Understanding the Heritage as stated above	<input type="checkbox"/>
		5.3	The programme for assessing significance as stated above	<input type="checkbox"/>
		5.4	The programme form conservation management aims as stated above	<input type="checkbox"/>
		5.5	The programme for creating the costed action plan for the vessel	<input type="checkbox"/>

		5.6	The programme for issuing drafts, final consultations and the final document	<input type="checkbox"/>
6	Costs (see Annex 4 for Pricing Approach)	6.1	A breakdown of costs for the work and materials as specified in Annex 1.	<input type="checkbox"/>
		6.2	Any travel, subsistence and accommodation cost for the work proposed in Annex 1.	<input type="checkbox"/>
		6.3	Schedule of hourly rates for the proposed labour, including sub-contractors	<input type="checkbox"/>
7	Insurance	7.1	Full extent of professional insurance or indemnity cover	<input type="checkbox"/>

## Part 2: Confidential/Commercially Sensitive Document Template

Below is a recommended template to allow potential suppliers to indicate any confidential/commercially sensitive information in accordance with the requirements of the Confidentiality and Information Governance section of this ITT.

**Specify the precise elements which are considered confidential and/or commercially sensitive**

**Why do you consider an exemption under the POIA or EIR would apply?**

**Specify the estimated length of time during which the exemption will apply**

## Annex 3 – Pricing Approach

The following sets out information and a recommended template for the content and format of the pricing proposals for a bid.

### Information

The potential supplier is requested to use terminology consistent with this ITT.

All pricing should be in Pound Sterling (GBP) and Exclusive of VAT.

As part of this ITT the NMRN require two types of pricing proposals;

- 1) A breakdown of costs for the works specified within this ITT (see Annex 1)
- 2) A breakdown of hourly costs for the supplier and any subcontractors, including any travel, subsistence and accommodation.

### Template

- 1) A breakdown of costs for the works specified within this ITT

The following is a template for the fee proposal breakdown. It is recommended that this breakdown should include reference the scheduled works programme, bringing in milestones and dates. Please note this template is a guidance document and therefore is not all encompassing. Stages and Tasks can be added or removed by tenderers where seen fit:

Item	Description	Staff Member	Days	Cost (£) (Lump Sum)	Program & Milestone
<b>1</b>	Stage 1 – Start Up				
<b>1.1</b>	Site visit to scope up detailed RAMS, schedule of works and review of information held by NMRN		0.25	£X	Week commencing (w/c)
<b>1.2</b>	Delivery of detailed scheduled work programme		-		w/c -
<b>2</b>	Stage 2 – Understanding the Heritage				
<b>2.1</b>	Data Gathering				w/c
<b>2.2</b>	Fieldwork				
<b>2.3</b>	CMP draft of Understanding the Heritage, inventories, gazetteers and phase plans				
	<i>Half-way stage invoice</i>				
<b>3</b>	Stage 3 – Statement of Significance				
<b>3.1</b>	Draft Section of CMP for Statement of Significance				w/c
<b>3.2</b>	Consultations				
<b>4</b>	Stage 4 – Conservation Management Aims/Policies				

4.1	Consultations on requirements/management etc.				
4.2	CMP draft Section				
5	Stage 5 – Costed Action Plan				
5.1	Draft section of Costed Action Plan				
6	Revisions to draft				
7	Publication & Printing				
8	Submission of final				
	<i>Final invoice</i>				
<b>TOTAL (EXC. VAT)</b>			<b>X Days</b>	<b>£X</b>	<b>w/c – w/end</b>

- 2) A breakdown of hourly costs for the supplier and any subcontractors, including travel, subsistence and accommodation..

Below is a desired template of daily rate costs from the supplier and their sub-contractors:

Staff Member	Daily Rate (£)	Travel (per day or per visit) (£)	Accommodation (per night) (£)	Subsistence (per day) (£)
	£X	£X	£X	£X
	£X	£X	£X	£X
	£X	£X	£X	£X

## Annex 4 – Tender Conditions & Contractual Requirements

### 1. Contracting requirements

1.1 The contracting authority is NMRN Operations, or any NMRN subsidiary companies and other organisations that control or are controlled by the NMRN from time to time.

1.2 The appointed supplier will be expected to travel to Hartlepool.

1.3 The NMRN's contracting and commercial approach in respect of the required goods and/or services is set out at Annex 5 (Terms and Conditions of contract) ("**Contract**"). By submitting a tender response, you are agreeing to be bound by the terms of this ITT and the Contract without further negotiation or amendment.

1.4 The Contract awarded will be for a duration as quantified by the tenderer during the tendering process with an option for an extension if the need arises and on permission by the NMRN.

1.5 In the event that you have any concerns or queries in relation to the Contract, you should submit a clarification request in accordance with the provisions of this ITT by the Clarification Deadline (as defined below in the Timescales section of this ITT). Following such clarification requests, the NMRN may issue a clarification change to the Contract that will apply to all potential suppliers submitting a tender response.

1.6 The NMRN is under no obligation to consider any clarifications / amendments to the Contract proposed following the Clarification Deadline, but before the Tender Response Deadline (as defined below in the Timescales section of this ITT). Any proposed amendments that are received from a potential supplier as part of its tender response shall entitle the NMRN to reject that tender response and to disqualify that potential supplier from this Procurement Process.

### 2. Policy Requirements

2.1 By submitting a tender response in connection with this Procurement Process, potential suppliers confirm that they will, and that they shall ensure that any consortium members and/or subcontractors will, comply with all applicable laws, codes of practice, statutory guidance and applicable NMRN policies relevant to the goods and/or services being supplied.

2.2 For the successful delivery of the work the tenderer should have an in-depth understanding of surveying and writing Conservation Management Plans for historic timber vessels.

2.3 The tenderer must exercise full awareness in the appropriate practises of working within a historic marine environment: **Conserving Historic Vessels**, National Historic Ships (2010), **Conservation Principles, Policies & Guidance**, Historic England (2008) [<https://content.historicengland.org.uk/images-books/publications/conservation-principles-sustainable-management-historic-environment/conservationprinciplespoliciesguidanceapr08web.pdf>]. Any methods used will not pose a risk to the historic material. All intended material intervention must be notified to the NMRN as part of the tender process and receive written consent before work commences.

2.4 The tenderer must also comply with IOSH Health & Safety Standards when on the NMRN's site and when undertaking the tendered work [<http://www.iosh.co.uk/>]. When working in confined spaces or at height, the contractor and/or any sub-contractor must have the necessary relevant training in confined spaces and/or working at height before work commences.

2.5 The Copyright of any information and/or data generated by the awarded supplier as part of the works as set out in this ITT shall be considered as under the ownership of the NMRN.

### 3. General Tender Conditions (“Tender Conditions”)

3.1 Application of these Tender Conditions – In participating in this Procurement Process and/or by submitting a tender response it will be implied that you accept and will be bound by all the provisions of this ITT and its Annexes. Accordingly, tender responses should be on the basis of and strictly in accordance with the requirements of this ITT.

3.2 Third party verifications – Your tender response is submitted on the basis that you consent to the NMRN carrying out all necessary actions to verify the information that you have provided, and the analysis of your tender response being undertaken by one or more third parties commissioned by the NMRN for such purposes.

3.3 Information provided to potential suppliers – Information that is supplied to potential suppliers as part of this Procurement Process is supplied in good faith. The information contained in the ITT and the supporting documents and in any related written or oral communication is believed to be correct at the time of issue but the NMRN will not accept any liability for its accuracy, adequacy or completeness and no warranty is given as such. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of the NMRN.

3.4 Potential suppliers to make their own enquires – You are responsible for analysing and reviewing all information provided to you as part of this Procurement Process and for forming your own opinions and seeking advice as you consider appropriate. You should notify the NMRN promptly of any perceived ambiguity, inconsistency or omission in this ITT and/or any in of its associated documents and/or in any information provided to you as part of this Procurement Process.

3.5 Amendments to the ITT – At any time prior to the Tender Response Deadline, the NMRN may amend the ITT. Any such amendment shall be issued to all potential suppliers, and if appropriate to ensure potential suppliers have reasonable time in which to take such amendment into account, the Tender Response Deadline shall, at the discretion of the NMRN, be extended. Your tender response must comply with any amendment made by the NMRN in accordance with this paragraph 3.3.5 or it may be rejected.

3.6 Compliance of tender response submission – Any goods and/or services offered should be on the basis of and strictly in accordance with the ITT (including, without limitation, any specification of the NMRN’s requirements, these Tender Conditions and the Contract) and all other documents and any clarifications or updates issued by the NMRN as part of this Procurement Process.

3.7 Format of tender response submission – Tender responses must comprise the relevant documents specified by the NMRN completed in all areas and in the format as detailed by the NMRN in Annex 2 (Supplier Response). Any documents requested by the NMRN must be completed in full. It is, therefore, important that you read the ITT carefully before completing and submitting your tender response.

3.8 Modifications to tender response documents once submitted – You may modify your tender response prior to the Tender Response Deadline by giving written notice to the NMRN. Any modification should be clear and submitted as a complete new tender response in accordance with Annex 2 (Supplier Response) and these Tender Conditions.

3.9 Rejection of tender responses or other documents – A tender response or any other document requested by the NMRN may be rejected which:

- contains gaps, omissions, misrepresentations, errors, uncompleted sections, or changes to the format of the tender documentation provided;
- contains hand written amendments which have not been initialled by the authorised signatory;
- does not reflect and confirm full and unconditional compliance with all of the documents issued by the NMRN forming part of the ITT;
- contains any caveats or any other statements or assumptions qualifying the tender response that are not capable of evaluation in accordance with the evaluation model or requiring changes to any documents issued by the NMRN in any way;
- is not submitted in a manner consistent with the provisions set out in this ITT;
- contains information which is inconsistent with answers already given in the pre-qualification questionnaire completed as part of this Procurement Process or;
- is received after the Tender Response Deadline.

3.10 Disqualification – If you breach these Tender Conditions, if there are any errors, omissions or material adverse changes relating to any information supplied by you at any stage in this Procurement Process, if any other circumstances set out in this ITT, and/or in any supporting documents, entitling the NMRN to reject a tender response apply and/or if you or your appointed advisers attempt:

- to inappropriately influence this Procurement Process;
- to fix or set the price for goods or services;
- to enter into an arrangement with any other party that such party shall refrain from submitting a tender response;
- to enter into any arrangement with any other party (other than another party that forms part of your consortium bid or is your proposed sub-contractor) as to the prices submitted;
- to collude in any other way;
- to engage in direct or indirect bribery or canvassing by you or your appointed advisers in relation to this Procurement Process; or
- to obtain information from any of the employees, agents or advisors of the NMRN concerning this Procurement Process (other than as set out in these Tender Conditions) or from another potential supplier or another tender response,

the NMRN shall be entitled to reject your tender response in full and to disqualify you from this Procurement Process. Subject to the “Liability” Tender Condition below, by participating in this Procurement Process you accept that the NMRN shall have no liability to a disqualified potential supplier in these circumstances.

3.11 Tender costs – You are responsible for obtaining all information necessary for preparation of your tender response and for all costs and expenses incurred in preparation of the tender response.

Subject to the “Liability” Tender Condition below, you accept by your participation in this procurement, including without limitation the submission of a tender response that you will not be entitled to claim from the NMRN any costs, expenses or liabilities that you may incur in tendering for this procurement irrespective of whether or not your tender response is successful.

3.12 Rights to cancel or vary this Procurement Process - By issuing this ITT, entering into clarification communications with potential suppliers or by having any other form of communication with potential suppliers, the NMRN is not bound in any way to enter into any contractual or other arrangement with you or any other potential supplier. It is intended that the remainder of this Procurement Process will take place in accordance with the provisions of this ITT but the NMRN reserves the right to terminate, suspend, amend or vary (to include, without limitation, in relation to any timescales or deadlines) this Procurement Process by notice to all potential supplier in writing. Subject to the “Liability” Tender Condition below, the NMRN will have no liability for any losses, costs or expenses caused to you as a result of such termination, suspension, amendment or variation.

3.13 Consortium Members and sub-contractors – It is your responsibility to ensure that any staff, consortium members, sub-contractors and advisers abide by these Tender Conditions and the requirements of this ITT.

3.14 Liability – Nothing in these Tender Conditions is intended to exclude or limit the liability of the NMRN in relation to fraud or in other circumstances where the NMRN’s liability may not be limited under any applicable law.

#### **4. Mandatory Requirements / Constraints**

4.1 As part of your tender response, you must confirm that you meet the mandatory requirements / constraints, if any, as set out in the NMRN’s specification forming part of this ITT. A failure to comply with one or more mandatory requirements or constraints shall entitle the NMRN to reject a tender response in full.

#### **5 Confidentiality and Information Governance**

5.1 All information supplied to you by the NMRN, including this ITT and all other documents relating to this Procurement Process, either in writing or orally, must be treated in confidence and not disclosed to any third party (save to your professional advisers, consortium members and/or sub-contractors strictly for the purposes only of helping you to participate in this Procurement Process and/or prepare your tender response) unless the information is already in the public domain or is required to be disclosed under any applicable laws.

5.2 You shall not disclose, copy or reproduce any of the information supplied to you as part of this Procurement Process other than for the purposes of preparing and submitting a tender response. There must be no publicity by you regarding the Procurement Process or the future award of any contract unless the NMRN has given express written consent to the relevant communication.

5.3 This ITT and its accompanying documents shall remain the property of the NMRN and must be returned on demand.

5.4 The NMRN reserves the right to disclose all documents relating to this Procurement Process, including without limitation your tender response, to any employee, third party agent, adviser or other third party involved in the procurement in support of, and/or in collaboration with, the NMRN. The NMRN further reserves the right to publish the Contract once awarded and/or disclose information in connection with supplier performance under the Contract in accordance with any public sector transparency policies (as referred to below). By participating in this Procurement Process, you agree to

such disclosure and/or publication by the NMRN in accordance with such rights reserved by it under this paragraph.

5.5 The use of blanket protective markings of whole documents such as “commercial in confidence” will not be sufficient. By participating in this Procurement Process you agree that the NMRN should not and will not be bound by any such markings.

5.6 In addition, marking any material as “confidential” or “commercially sensitive” or equivalent should not be taken to mean that the NMRN accepts any duty of confidentiality by virtue of such marking. You accept that the decision as to which information will be disclosed is reserved to the NMRN, notwithstanding any consultation with you or any designation of information as confidential or commercially sensitive or equivalent you may have made. You agree, by participating further in this Procurement Process and/or submitting your tender response, that all information is provided to the NMRN on the basis that it may be used by the NMRN in accordance with the provisions of this ITT.

5.7 Tender responses are also submitted on the condition that the appointed supplier will only process personal data (as may be defined under any relevant data protection laws) that it gains access to in performance of this Contract in accordance with the NMRN’s instructions and will not use such personal data for any other purpose. The contracted supplier will undertake to process any personal data on the NMRN’s behalf in accordance with the relevant provisions of any relevant data protection laws and to ensure all consents required under such laws are obtained.

## **6. Tender Validity**

6.1 Your tender response must remain open for acceptance by the NMRN for a period of ninety days from the Tender Response Deadline. A tender response not valid for this period may be rejected by the NMRN;

## **7. Payment and Invoicing**

7.1 The NMRN will pay correctly addressed and undisputed invoices within 30 days in accordance with the requirements of the Contract. Suppliers to the NMRN must ensure comparable payment provisions apply to the payment of their sub-contractors and the sub-contractors of their sub-contractors. General requirements for an invoice for the NMRN include:

- A description of the good/services supplied is included.
- The NMRN’s reference number/Purchase Order number is included.
- The address must reflect that supplied on the NMRN Purchase Order.

## Annex 5 – Example Terms and Conditions of Contract

1. **THIS AGREEMENT** is made on [ ] 2017

### BETWEEN

**The National Museum of the Royal Navy** a company limited by guarantee and incorporated under number 6699696 with registered charity number 1126283 whose registered office is at H M Naval Base, PP66, Portsmouth, Hampshire PO1 3NH (“the Supplier”); and

[ ] a company registered in England and Wales with number [ ] whose registered office is at [ ] OR IF A PERSON [ ] of [ ] (“the Customer”).

## 2. BACKGROUND

2.2. The Customer wishes to purchase and the Supplier wishes to supply certain services subject to the following terms and conditions.

2.3. **NOW IT IS AGREED** as follows:

## 3. INTERPRETATION

### 3.1. Definitions

3.1.1. In this Agreement the following words and expressions shall have the following meanings:

<b>Charges</b>	the Supplier’s charges for the Services as set out in [specify] and any other sums due to the Supplier under this Agreement;
<b>Commencement Date</b>	the date of this Agreement
<b>Expiry Date</b>	the date the Contract ends
<b>Contract Period</b>	the term of the Contract from the Commencement Date to the Expiry Date
<b>Confidential Information</b>	all information disclosed by or on behalf of a party (in whatever medium including in written, oral, visual or electronic form and whether before or after the date of this Agreement) including all business, financial, commercial, technical, operational, organisational, legal, management and marketing information;

<b>Deliverables</b>	any documents, products and materials to be developed and provided by the Supplier as part of or in connection with the Services, including any products of the Services;
<b>Intellectual Property</b>	all inventions, patents, utility models, designs (including rights relating to semi-conductor topographies), database rights, copyright and related rights, rights in get up and trade marks (in each case whether registered or unregistered), together with all rights to the grant of and applications for the same and including all similar or analogous rights and all other rights in the nature of intellectual and industrial property throughout the world and all future rights of such nature; and
<b>Services</b>	the services described within the Tender Proposal, including the development and provision of any Deliverables.
<b>Contracts Finder</b>	the Government's publishing portal for public sector procurement opportunities
<b>SME</b>	an enterprise falling within the category of micro, small or medium-sized enterprises defined by the Commission Recommendation of 6 May 2003 concerning the definition of micro, small and medium-sized enterprises
<b>VCSE</b>	A non-governmental organisation that is value-driven and which principally reinvests its surpluses to further social, environmental or cultural objectives.

### 3.2. Construction

3.2.1. In this Agreement, unless otherwise specified or the context otherwise requires:

- words importing the singular only shall include the plural and vice versa;
- words importing the whole shall be treated as including a reference to any part;
- reference to this Agreement or to any other document is a reference to this Agreement or to that other document as modified, amended, varied, supplemented, assigned, novated or replaced from time to time as permitted by the provisions of this Agreement;
- reference to any legal term for any action, remedy, method of judicial proceeding, legal document, legal status, court, official or any legal concept, state of affairs or thing shall in respect of any jurisdiction other than England be deemed to include that which most closely approximates in that jurisdiction to the English legal term; and

- references to termination of this Agreement shall include its expiry.

3.2.2. Any phrase in this Agreement introduced by the term “include”, “including”, “in particular” or similar expression shall be construed as illustrative and shall not limit the sense of the words preceding that term.

3.2.3. Headings used in this Agreement are for reference only and shall not affect its construction or interpretation.

### 3.3. Other references

3.3.1. In this Agreement a reference to:

**this Agreement** means this agreement including all Schedules, Annexures, Exhibits and other attachments and recitals to this agreement;

**business day** means a day, other than a Saturday or a Sunday, on which banks are open for business in London;

**parties** means the Customer and the Supplier collectively, and “party” means either of them and their permitted assignees;

**person** includes any individual, firm, company, corporation, body corporate, government, state or agency of state, trust or foundation, or any association, partnership or unincorporated body of two or more of the foregoing (whether or not having separate legal personality and wherever incorporated or established);

**recorded delivery** means special or recorded delivery (or other “proof of delivery” or “proof of posting” service that Royal Mail may from time to time offer) and

**written** or **in writing** includes any non-transitory form of visible reproduction of words including email but not fax, email or, any form of messaging via social media or text message.

## 4. SERVICES

4.1. The Supplier shall provide and the Customer shall receive the Services on the terms set out in this Agreement.

4.2. The Supplier shall:

4.2.1. co-operate with the Customer in all matters relating to the Services;

4.2.2. observe all health and safety rules and regulations and any other security requirements that apply at any of the Customer’s premises. The Customer reserves the right to refuse the Supplier access to the Customer’s premises which is not necessary for the performance of the Services;

- 4.2.3. notify the Customer as soon as it becomes aware of any health and safety hazards or issues which arise in relation to the Services; and
  - 4.2.4. obtain, and at all times maintain, all necessary licences and consents and comply with all relevant legislation in relation to:
  - 4.2.5. the Services and their use by the Customer (including use of the Customer's equipment and software in conjunction with the Supplier's equipment and software); and
  - 4.2.6. use by the Supplier of the Deliverables and all documents, information and materials provided by the Supplier [or its agents, subcontractors, consultants or employees], including [computer programs, data, reports and specifications.
- 4.3. The Supplier may not charge for the time it spends assessing or responding to a request from the Customer for a change to the Services except with the prior written agreement of the Customer.
- 4.4. The Supplier acknowledges that:
- 4.4.1. it may be providing the Services for the benefit of any company in relation to which the Customer is a "group undertaking" as defined in section 1161 of the Companies Act 2006 or for the benefit of any unincorporated charity controlled by the Customer or any such company; and
  - 4.4.2. any such company is a third party beneficiary which may enforce the terms of this Agreement in accordance with the Contracts (Rights of Third Parties) Act 1999.

## 5. CUSTOMER'S OBLIGATIONS

### 5.1. The Customer shall:

- 5.1.1. use reasonable endeavours to co-operate with the Supplier in matters relating to the Services;
- 5.1.2. provide such access to the Customer's premises and data, and such office accommodation and other facilities as may reasonably be requested by the Supplier and agreed with the Customer in writing in advance, for the purposes of the Services;
- 5.1.3. provide such information as the Supplier may reasonably request and the Customer considers reasonably necessary, in order for the Customer to carry out the Services in a timely manner; and
- 5.1.4. inform the Supplier of all health and safety rules and regulations and any other security requirements that apply at any of the Customer's premises.

### 5.2. Actual or potential non-compliance by the Customer with any of its obligations in this clause and elsewhere shall only relieve the Supplier from performance under this Agreement:

- 5.2.1. to the extent that it restricts or precludes performance of the Services by the Supplier, and
- 5.2.2. if the Supplier has notified details to the Customer in writing promptly after the actual or potential non-compliance has come to its attention.

## 6. PERFORMANCE OF THE SERVICES

### 6.1. The Supplier shall:

- 6.1.1. perform the Services with reasonable skill and care and in accordance with generally recognised commercial practices and standards in the industry for similar services;
- 6.1.2. use personnel who are suitably skilled and experienced to perform tasks assigned to them, and in sufficient number to ensure that the Supplier's obligations are fulfilled;
- 6.1.3. ensure that the Services conform in all respects and at all times with any specification or description for the Services agreed by the parties and comply with all applicable legislation;
- 6.1.4. ensure that the Deliverables are of satisfactory quality; and
- 6.1.5. meet any agreed performance dates and time for performance by the Supplier shall be of the essence of this Agreement.

### 6.2. If the Supplier is in material breach of clause 6.1, the Customer may (without prejudice to any other rights it may have, including termination for material or repeated breach under clauses 15.1 and 15.1.1):

- 6.2.1. refuse to accept any subsequent performance of the Services which the Supplier attempts to make;
- 6.2.2. purchase substitute services from elsewhere;
- 6.2.3. hold the Supplier accountable for any loss and additional costs incurred; and

6.2.4. have all sums previously paid by the Customer to the Supplier under this Agreement refunded by the Supplier less a reasonable charge for provision of the Services up to the date of the breach.

6.3. The Customer's rights under this Agreement are in addition to the statutory terms implied in favour of the Customer by the Supply of Goods and Services Act 1982 and any other statute.

6.4. During the term of this Agreement and for a period of one year afterwards the Supplier shall maintain in force the following insurance policies with reputable insurance companies:

- 6.4.1. public liability insurance with a limit of at least £5 million per claim; and
- 6.4.2. professional indemnity insurance with a limit of at least £2 million for claims arising from a single event or series of related events in a single calendar year; and
- 6.4.3. employers liability insurance with a limit of at least £10 million per claim.

6.5. The provisions of this clause 5.2.2 shall extend to any substituted or remedial services provided by the Supplier.

## **7. IMPROVING VISIBILITY OF SUBCONTRACT OPPORTUNITIES AVAILABLE TO SMEs AND VCSEs IN THE SUPPLY CHAIN**

7.1. The Supplier shall:

- 7.1.1. subject to clause 3, advertise on Contracts Finder all subcontract opportunities arising from or in connection with the provision of the Goods and/or Services and/or Works above a minimum threshold of £25,000 that arise during the Contract Period;
- 7.1.2. within 90 days of awarding a subcontract to a subcontractor, update the notice on Contracts Finder with details of the successful subcontractor;
- 7.1.3. monitor the number, type and value of the subcontract opportunities placed on Contracts Finder advertised and awarded in its supply chain during the Contract Period;
- 7.1.4. provide reports on the information at clause 1.1.3 to a Contracting Authority in the format and frequency as reasonably specified by the Contracting Authority; and
- 7.1.5. promote Contracts Finder to its suppliers and encourage those organisations to register on Contracts Finder.

7.2. Each advert referred to at clause 1.1 above shall provide a full and detailed description of the subcontract opportunity with each of the mandatory fields being completed on Contracts Finder by the Supplier.

7.3. The obligation at Clause 1.1 shall only apply in respect of subcontract opportunities arising after the contract award date.

7.4. Notwithstanding clause 1, the Contracting Authority may by giving its prior written approval, agree that a subcontract opportunity is not required to be advertised on Contracts Finder.

## 8. CHARGES AND PAYMENT

8.1. In consideration of the provision of the Services, the Customer shall pay to the Supplier the Charges. Unless specified, the Customer shall be under no obligation to reimburse to the Supplier costs and expenses incurred by the Supplier in the performance of the Services.

8.2. Where Services are provided on a time and materials basis:

- 8.2.1. the Supplier's standard daily fee rates for each person are calculated on the basis of an eight-hour day, worked between 8.00 am and 5.00 pm on weekdays (excluding public holidays);
- 8.2.2. all materials shall be supplied at cost unless specified;
- 8.2.3. the Supplier shall not be entitled to charge on a pro-rata basis for part-days worked by the Supplier's personnel unless it has the Customer's prior written consent to do so;
- 8.2.4. the Supplier shall ensure that the Supplier's personnel complete time sheets recording time spent on the Services, and the Supplier shall use such time sheets to calculate the charges covered by each monthly invoice;
- 8.2.5. each invoice shall set out the time spent by each of the Supplier's personnel and be accompanied by timesheets; and
- 8.2.6. the Supplier shall maintain complete and accurate records of the time spent and materials used by the Supplier in providing the Services in such form as the Customer shall approve. The Supplier shall allow the Customer and its agents to inspect and take copies of such records at all reasonable times on request.

8.3. All Charges are expressed exclusive of VAT. The Customer shall pay to the Supplier, in addition to the Charges, the amount of VAT (if any) which is properly chargeable by the Supplier to the Customer on or in respect of the Charges.

8.4. Unless otherwise specified, the Charges and any reimbursable costs and expenses shall be invoiced monthly in arrears. Invoices for agreed expenses shall be payable only if accompanied by a detailed breakdown of the expenses and relevant receipts.

8.5. Payment of invoices in relation to which there is no bona fide dispute shall be made in full within 30 days of the date of invoice. Payment of invoices in relation to which there is a bona fide dispute shall be made within 45 days of settlement of the dispute. The time for payment of the Charges shall not be of the essence of this Agreement.

8.6. If the liabilities to be set off are expressed in different currencies, the Customer may convert either liability at a market rate of exchange for the purpose of set-off. Any exercise by the Customer of its rights under this clause shall not limit or affect any other rights or remedies available to it under this Agreement or otherwise.

## 9. CONFIDENTIALITY

9.1. Each party shall use the Confidential Information of the other party disclosed to it (by whoever disclosed) only for the proper performance of its duties under the Agreement and shall not without

the disclosing party's written consent disclose or permit the disclosure of the Confidential Information except in confidence for the proper performance of its duties under the Agreement to those of its employees, officers and professional advisers who need to have access to it.

9.2. The provisions of clause 9 shall not apply to Confidential Information that:

- 9.2.1. the receiving party can prove was known to the receiving party or in its possession before that information was acquired from, or from some person on behalf of, the disclosing party;
- 9.2.2. is in or enters the public domain through no wrongful default of the receiving party or any person on its behalf, provided that this clause 9.2.1 shall only apply from the date that the relevant Confidential Information enters the public domain;
- 9.2.3. the receiving party receives from a third party without similar obligations of confidence in circumstances where the third party did not obtain that information as a result of a breach of an obligation of confidence; or
- 9.2.4. is required to be disclosed by any applicable law or by order of any Court of competent jurisdiction or any government body, agency or regulatory body, to the extent of the required disclosure.

9.3. If the receiving party has reasonable grounds to believe that the disclosing party is involved in activity that constitutes an offence under the Bribery Act 2010, it may disclose relevant Confidential Information to the Serious Fraud Office (or other relevant government body) without informing the disclosing party of such disclosure.

9.4. Within three (3) days of receipt of a request to do so made at any time and in any event if the Agreement is terminated, the receiving party shall promptly return or destroy (at the option of the disclosing party) all Confidential Information of the disclosing party.

## 10. INTELLECTUAL PROPERTY

10.1. As between the Supplier and the Customer, all Intellectual Property created in the course of the Services (including in the Deliverables) which subsists now or at any time in the future shall be the exclusive property of the Customer. To the extent that any Intellectual Property created in the course of the Services vests in the Supplier, the Supplier assigns (by way of assignment of present and future rights) without payment all such Intellectual Property to the Customer with full title guarantee. If the Supplier is unable to assign such Intellectual Property (because the laws in another country differ from English law and do not permit such assignment), the Supplier shall immediately on request execute all documents that may be necessary to effect the transaction that most closely resembles the commercial intent of an assignment and is permitted in the relevant territory. Pending the above assignments and remaining formalities relating to such assignments, the Supplier shall hold all such Intellectual Property on trust for the Customer.

## 11. INDEMNITY

11.1. The Supplier shall indemnify and hold the Customer harmless from all claims and all direct, indirect or consequential liabilities (including loss of profits, loss of business, depletion of goodwill and similar losses), costs, proceedings, damages and expenses (including legal and other professional fees and expenses) awarded against, or incurred or paid by, the Customer as a result of or in connection with:

11.1.1. any alleged or actual infringement, whether or not under English law, of any third party's Intellectual Property or other rights relating to or arising out of the use of anything created in the course of providing Services; or

11.1.2. any claim made against the Customer in respect of any liability, loss, damage, injury, cost or expense sustained by the Customer's employees or agents or by any customer or third party to the extent that such liability, loss, damage, injury, cost or expense was caused by, relates to or arises from the provision of the Services as a consequence of a breach or negligent performance or failure or delay in performance of this Agreement by the Supplier.

## 12. RISK AND TITLE IN THE DELIVERABLES AND OTHER MATERIALS

12.1. Title to and risk of damage to or loss of the Deliverables shall pass to the Customer on delivery.

12.2. All documents, equipment, drawings, specifications and all other materials and data supplied by the Customer to the Supplier shall, at all times, be and remain as between the Customer and the Supplier the exclusive property of the Customer. They shall be held by the Supplier in safe custody at its own risk and maintained and kept in good condition by the Supplier until returned to the Customer. They shall not be disposed of or used other than in accordance with the Customer's written instructions or authorisation. **Error! Reference source not found.**

## 13. ANTI-BRIBERY AND ANTI-CORRUPTION

13.1. The Supplier shall:

13.1.1. comply with all applicable laws, statutes and regulations relating to anti-bribery and anti-corruption including but not limited to the Bribery Act 2010 (**Relevant Requirements**);

13.1.2. not engage in any activity, practice or conduct which would constitute an offence under sections 1, 2 or 6 of the Bribery Act 2010 if such activity, practice or conduct had been carried out in the UK;

13.1.3. have and shall maintain in place throughout the term of this agreement its own policies and procedures, including adequate procedures under the Bribery Act 2010, to ensure compliance with the Relevant Requirements, and will enforce them where appropriate; and

13.1.4. promptly report to the Customer any request or demand for any undue financial or other advantage of any kind received by the Seller in connection with the performance of this Agreement.

13.2. Breach of this clause 13 shall be deemed a material breach.

13.3. For the purpose of this clause 13 the meaning of adequate procedures and foreign public official and whether a person is associated with another person shall be determined in accordance with section 7(2) of the Bribery Act 2010 (and any guidance issued under section 13 of that Act), sections 6(5) and 6(6) of that Act and section 8 of that Act respectively.

## 14. DATA PROTECTION

### 14.1. Properly notified

14.1.1. Each party warrants that it has made all relevant notifications in accordance with its obligations under the Data Protection Act 1998 to the extent required for the processing of personal data (as defined under that Act) in the performance of its obligations and exercise of its rights under this Agreement.

### 14.2. Compliance

The parties agree to comply with the relevant provisions of the Data Protection Act 1998 and any directions issued by the Information Commissioner in its processing of such personal data.

## 15. TERMINATION

15.1. This Agreement may be terminated:

15.1.1. immediately by either party on written notice, if the other is in material breach of an obligation under this Agreement and in the case of any such breach capable of remedy has failed to remedy the breach within a period of 30 days after receipt of written notice to do so;

15.1.2. immediately by either party on written notice, if the other party repeatedly breaches any of the terms of this Agreement in such manner as reasonably demonstrates conduct which is inconsistent with an intention or ability to give effect to the terms of this Agreement.

15.1.3. immediately by either party on written notice:

- if the other party is dissolved or struck off the register of companies maintained by Companies House or it suspends or ceases, or threatens to suspend or cease, carrying on all or a substantial part of its business or it is removed from the Register of Companies or ceases to exist (whether or not capable of re-instatement or re-construction);
- if a meeting is convened, a petition is filed, a notice is given, a resolution is passed or an order is made for or in connection with the winding up of the other party except for the purpose of a solvent reconstruction, reorganisation, merger or consolidation;
- if a person becomes entitled to appoint or has appointed a receiver (including fixed charge or court appointed), administrative receiver, liquidator, administrator, manager, insolvency practitioner or similar officer over the whole or a substantial part of the undertaking, property or assets of the other party;

- if the other party stops or suspends, or threatens to stop or suspend, payment of its debts or is unable to pay its debts as they fall due or admits inability to pay its debts or is deemed unable to pay its debts within the meaning of section 123 of the Insolvency Act 1986;
- if a statutory demand is presented against the other party (which is not the subject of a bona fide dispute) and remains unsatisfied for more than 21 days;
- if the other party commences negotiations with all or any class of its creditors with a view to rescheduling any of its debts or enters into (or proposes to enter into) a composition, scheme of arrangement or voluntary arrangement with any of its creditors or otherwise or a moratorium is agreed imposed or declared in respect of or affecting all or a material part of (or of a particular type of) the debts of the other party;
- if notice of intention to appoint an administrator is given by any person (including the other party's directors, the other party or any qualifying floating charge holder as defined in the Insolvency Act 1986), an application is made to court or an order is made for the appointment of an administrator or if an administrator is appointed or any step is taken by any person with a view to placing the other party into administration as defined by the Insolvency Act 1986; or
- if any event or circumstance occurs which under the law of any relevant jurisdiction has an analogous or equivalent effect to any of the events listed in clauses □ to □ in relation to the other party.

15.2. For the purposes of this clause 15:

15.2.1. a breach shall be considered capable of remedy:

- if the party in breach can comply with the provision in question in all respects other than as to the time of performance; and
- if time of performance is not of the essence.

15.3. Termination of this Agreement for any reason, whether under this clause 15 or not, shall be without prejudice to the accrued rights and liabilities of the parties on the date of termination.

15.4. Upon the termination of this Agreement for any reason:

15.4.1. the Supplier shall immediately deliver to the Customer all Deliverables whether or not then complete, and return all materials of the Customer referred to in clause 12.2; and

15.4.2. the Supplier shall, if so requested by the Customer, provide all assistance reasonably required by the Customer to facilitate the smooth transition of the Services to the Customer or any replacement supplier appointed by it. In the absence of agreement, the Customer shall pay for any such assistance at the Supplier's standard time and material rates.

## 16. GENERAL

### 16.1. Subcontracting and Assignment

- 16.1.1. The Supplier may not without the prior written consent of the Customer sub-contract to any other person the performance of any of the obligations undertaken by it.
- 16.1.2. The Customer may assign, transfer (in whole or in part), charge, declare a trust over or deal in any manner with this Agreement or the benefit or burden of or the rights under this Agreement.
- 16.1.3. The Supplier may not without the prior written consent of the Customer assign, transfer (in whole or in part), charge, declare a trust over or deal in any manner with this Agreement or the benefit or burden of or the rights under this Agreement.

### 16.2. Force Majeure

- 16.2.1. Neither party shall be liable to the other party for any delay or non-performance of its obligations under this Agreement to the extent that its performance is interrupted or prevented by any act or omission beyond its reasonable control.
- 16.2.2. Such delay or non-performance shall not constitute a breach of this Agreement and the time for performance shall be extended by a period equivalent to that during which performance is so prevented provided that if such delay or failure persists for sixty (60) days or more, the party not affected may, at its option and if in its opinion it is reasonable for it to do so, terminate this Agreement by giving fourteen (14) days written notice of such termination to the other party.

### 16.3. Amendments

- 16.3.1. No amendment of this Agreement shall be effective unless it is in writing and signed by or on behalf of each of the parties.

### 16.4. Waivers and Remedies

- 16.4.1. Except as otherwise stated in this Agreement, the rights and remedies of each party under this Agreement:
  - are in addition to and not exclusive of any other rights or remedies under this Agreement or the general law; and
  - may be waived only in writing and specifically.
- 16.4.2. Delay in exercising or non-exercise of any right under this Agreement is not a waiver of that or any other right.
- 16.4.3. Partial exercise of any right under this Agreement shall not preclude any further or other exercise of that right or any other right under this Agreement.
- 16.4.4. Waiver of a breach of any term of this Agreement shall not operate as a waiver of breach of any other term or any subsequent breach of that term.

## 16.5. Severance

16.5.1. If any provision of this Agreement is or becomes illegal, invalid or unenforceable in any jurisdiction, that shall not affect:

- the legality, validity or enforceability in that jurisdiction of any other provision of this Agreement; or
- the legality, validity or enforceability in any other jurisdiction of that or any other provision of this Agreement.

## 16.6. Entire Agreement

16.6.1. This Agreement:

- constitutes the entire agreement between the parties with respect to the subject matter of this Agreement; and
- supersedes and extinguishes any prior drafts, agreements, undertakings, understandings, promises or conditions, whether oral or written, express or implied between the parties relating to such subject matter.

16.6.2. Each party acknowledges to the other that it has not been induced to enter into this Agreement by, nor has it relied upon, any representation, promise, assurance, warranty or undertaking (whether in writing or not) by or on behalf of the other party or any other person save for those contained in this Agreement. Accordingly, each of the parties acknowledges and agrees that the only remedy available to it in respect of the subject matter of this Agreement shall be for breach of contract under the terms of this Agreement and it shall have no right of action against any other party in respect of any such representation, promise, assurance, warranty or undertaking.

16.6.3. This clause shall not exclude any liability which either party would otherwise have to the other or any right which either of them may have to rescind this Agreement in respect of any statements made fraudulently by the other prior to the execution of this Agreement or any rights which either of them may have in respect of fraudulent concealment by the other.

16.6.4. In the event of a conflict between any of the terms of this Agreement, the conflict shall be resolved according to the following descending order of priority, (i) the clauses of this Agreement, then (ii) the Schedules.

## 16.7. Survival Of Obligations

16.7.1. Notwithstanding any provision of this Agreement to the contrary, the provisions of clauses 8, 9, 10, 10.1, 12, 13, 15.3, 15.3, and 16 and any other clauses which expressly or impliedly survive termination of this Agreement for any reason whatsoever shall continue in full force and effect after termination.

#### 16.8. No Partnership/Agency

16.8.1. Nothing in this Agreement is intended to or shall operate to create a partnership or joint venture of any kind between the parties, or to authorise either party to act as agent for the other, and neither party shall have authority to act in the name or on behalf of or otherwise to bind the other in any way (including the making of any representation or warranty, the assumption of any obligation or liability and the exercise of any right or power).

#### 16.9. Rights of Third parties

16.9.1. Subject to clause 4.3, a person who is not a party has no rights under the Contracts (Rights of Third Parties) Act 1999 to enforce, or to enjoy the benefit of, any provision of this Agreement but this does not affect any right or remedy of a third party which exists or is available apart from that Act.

#### 16.10. Notices

16.10.1. All notices between the Parties with respect to the Agreement shall be in writing and signed by or on behalf of the Party giving it. Any notice shall be duly served (i) on delivery if delivered by hand, (ii) 48 hours after sending if sent by first class post or special or recorded delivery (or other “proof of delivery” or “proof of posting” service that Royal Mail may from time to time offer) or (iii) on sending if sent by fax or email (provided that a copy is also sent by post), provided that in each case the notice is sent to the address of the addressee given at the start of the Agreement or such other address as the addressee may from time to time have notified for the purpose of this condition.

16.10.2. Any notice or communication given under the Agreement shall not be validly served if sent by text messaging via mobile phone.

#### 16.11. Governing Law

16.11.1. The Agreement and any dispute or claim arising out of or in connection with it (including any non-contractual claims or disputes) shall be governed by and construed in accordance with the laws of England and Wales.

#### 16.12. Jurisdiction

16.12.1. In relation to any legal action or proceedings (a) arising out of or in connection with the Agreement or its implementation or effect or (b) relating to any non-contractual obligations arising out of or in connection with the Agreement, each of the Parties irrevocably submits to the exclusive jurisdiction of the English courts and waives any objection to proceedings in such courts on the grounds of venue or on the grounds that proceedings have been brought in an inappropriate forum.

16.12.2. This Agreement has been entered into on the date stated at the beginning of it.

Signed for and on behalf of )  
[The Supplier]: )

\_\_\_\_\_  
*(Signature of director)*

Director

\_\_\_\_\_  
(name of director)

Signed for and on behalf of )  
**The National Museum of the Royal Navy:** )

\_\_\_\_\_  
*(Signature)*

\_\_\_\_\_  
(name)