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Tender

## **Scottish Enterprise Pension Advice**

Scottish Enterprise

F02: Contract notice

Notice identifier: 2022/S 000-003443

Procurement identifier (OCID): ocds-h6vhtk-03140e

Published 7 February 2022, 3:04pm

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

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

Scottish Enterprise

Atrium Court, 50 Waterloo Street

Glasgow

G2 6HQ

#### **Contact**

Joanne Napier

#### **Email**

[joanne.napier@scotent.co.uk](mailto:joanne.napier@scotent.co.uk)

#### **Telephone**

+44 1414686024

#### **Country**

United Kingdom

**NUTS code**

UKM82 - Glasgow City

**Internet address(es)**

Main address

<http://www.scottish-enterprise.com/>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00398](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00398)

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

The contract is awarded by a central purchasing body

**I.3) Communication**

Access to the procurement documents is restricted. Further information can be obtained at

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

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

Regional or local Agency/Office

## **I.5) Main activity**

Economic and financial affairs

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## **Section II: Object**

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

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

Scottish Enterprise Pension Advice

Reference number

P22-0010

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

- 66520000 - Pension services

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

Services

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

Scottish Enterprise (SE) would like to invite tenders for the provision of accounting advice, actuarial advice and pension and benefits advice to the organisation which is independent of the Trustees' adviser, for a period of 5 years from 1st August 2022 to 31st July 2027.

The Scottish Enterprise Pension and Life Assurance Scheme (SEPLAS) "the scheme", has its own actuaries and advisers in place.

The tender will be carried out through the Open process

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

Value excluding VAT: £305,000

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

This contract is divided into lots: No

## **II.2) Description**

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

- 66520000 - Pension services
- 66500000 - Insurance and pension services

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

NUTS codes

- UKM - Scotland

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

Scottish Enterprise (SE) would like to invite tenders for the provision of accounting advice, actuarial advice and pension and benefits advice to the organisation which is independent of the Trustees' adviser (The SE Pension and Life Assurance Scheme (the Scheme) has its own Actuaries' and Advisers) for the period from 1st August 2022 to 31st July 2027. We intend to appoint a single supplier to provide this service.

Scottish Enterprise will require the following services within the the scope of this contract:

- Accounting advice and information
- Pension and benefits support
- Actuarial advice
- Staff communications

There will also be a degree of ad hoc work required, however the level of this cannot be determined or guaranteed.

We plan to put a contract in place for a total of five years due to the timings of the next two 3-yearly valuations which will take place under this contract.

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

Quality criterion - Name: Proejct Team Structure / Weighting: 30

Quality criterion - Name: Methodology / Weighting: 30

Quality criterion - Name: Understanding the project requirements / Weighting: 20

Quality criterion - Name: Information Security / Weighting: 10

Quality criterion - Name: Business Continuity / Weighting: 5

Quality criterion - Name: Fair Work First / Weighting: 5

Price - Weighting: 40

**II.2.6) Estimated value**

Value excluding VAT: £305,000

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

Duration in months

60

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: No

**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**

See attached ITT for full details

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

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

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

List and brief description of conditions

The relevant selection criteria will be included in the SPD Scotland online module.

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

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland online module.

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

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland online module.

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

#### **III.2.1) Information about a particular profession**

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

The relevant selection criteria will be included in the SPD Scotland online module.

#### **III.2.3) Information about staff responsible for the performance of the contract**

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

## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **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

10 March 2022

Local time

11:00am

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

English

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

Date

10 March 2022

Local time

11:00am

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## **Section VI. Complementary information**

### **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**

SPD Statement for 2A.17 – Form of Participation (Notably as part of a group, consortium, joint venture or similar).

Any contract will be entered into with the nominated lead organisation and all members of the consortium, who will in these circumstances each be required to execute said contract together with all ancillary documentation, evidencing their joint and several liability in respect of the obligations and liabilities of the contract. It will be for members of the consortium to sort out their respective duties and liabilities amongst each other. For

administrative purposes, any associated documentation will be sent to the nominated lead organisation.

SPD Statement for 2C.1 - Where the main bidder relies on the capacities of other entities in order to meet the selection criteria, the bidder must provide a separate SPD response setting out the information required under SPD (Scotland): Part II (sections A and B); Part III exclusion grounds; the relevant part of Section IV selection criteria; and Part V (if applicable) for each of the entities concerned.

SPD Statement for 2D.1.2 – If the bidder proposes to subcontract any part(s) of the service and those sub-contractors are not relied upon, they should arrange for a separate SPD response from each potential subcontractor. The subcontractors must complete the relevant parts of the SPD (Scotland) (Sections A and B of Part II and Part III only) to self-declare whether there are grounds for their exclusion. This may be requested at the selection stage or prior to the subcontractor commencing work on the contract.

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

[https://www.publiccontractsscotland.gov.uk/Search/Search\\_Switch.aspx?ID=680234](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=680234).

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

[https://www.publiccontractsscotland.gov.uk/sitehelp/help\\_guides.aspx](https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx).

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(SC Ref:680234)

Download the ESPD document here:

[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=680234](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=680234)

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

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

Glasgow Sheriff Court and Justice of the Peace Court

Sheriff Clerk's Office, PO Box 23, 1 Carlton Place,

Glasgow

G5 9DA

Telephone

+44 1414298888

Country

United Kingdom

Internet address

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

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

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

[SPOEprocurement@scotland.gsi.gov.uk](mailto:SPOEprocurement@scotland.gsi.gov.uk)

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>

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

Precise information on deadline(s) for review procedures

In the first instance, contact the Head of Facilities Management and Procurement at Scottish Enterprise, with any concerns or enquiries. Email: <https://www.scottish-enterprise.com/help/contact-us>.

An economic operator that suffers, or risks suffering, loss or damage attributable to a breach of duty under the Public Contracts (Scotland) Regulations 2015, may bring proceedings that will be started in the High Court.

#### **VI.4.4) Service from which information about the review procedure may be obtained**

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

[SPOEprocurement@scotland.gsi.gov.uk](mailto:SPOEprocurement@scotland.gsi.gov.uk)

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+44 1412425466

Country

United Kingdom

Internet address

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