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Tender

## **Pension Scheme (Defined Contribution) and Employee Benefits**

North Western Universities Purchasing Consortium

F02: Contract notice

Notice identifier: 2025/S 000-005038

Procurement identifier (OCID): ocds-h6vhtk-04b383

Published 13 February 2025, 7:46pm

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

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

North Western Universities Purchasing Consortium

Salford Innovation Forum, Room 210, 51 Frederick Road

Salford

M6 6FP

#### **Contact**

Sarah Dye

#### **Email**

[sarah.dye@nwupc.ac.uk](mailto:sarah.dye@nwupc.ac.uk)

#### **Telephone**

+44 1612348016

**Country**

United Kingdom

**Region code**

UK - United Kingdom

**National registration number**

04045190

**Internet address(es)**

Main address

<https://nwupc.ac.uk/>

Buyer's address

<https://uk.eu-supply.com/ctm/Company/CompanyInformation/Index/91080>

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

The contract is awarded by a central purchasing body

**I.3) Communication**

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

[https://uk.eu-supply.com/app/rfq/rwlentrance\\_s.asp?PID=89289&B=NWUPC](https://uk.eu-supply.com/app/rfq/rwlentrance_s.asp?PID=89289&B=NWUPC)

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

[https://uk.eu-supply.com/app/rfq/rwlentrance\\_s.asp?PID=89289&B=NWUPC](https://uk.eu-supply.com/app/rfq/rwlentrance_s.asp?PID=89289&B=NWUPC)

Tenders or requests to participate must be submitted to the above-mentioned address

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

Other type

Sub-central contracting authority

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

Education

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## **Section II: Object**

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

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

Pension Scheme (Defined Contribution) and Employee Benefits

Reference number

PFB3038NW

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

- 66520000 - Pension services

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

Services

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

NWUPC in conjunction with UCEA has a requirement to establish a Framework Agreement for the provision of a Defined Contribution Master Trust Pension Scheme and Employee Benefits including Group Life Assurance, Group Income Protection and the provision of a customisable benefits platform for the management of employee benefits through a single centralised portal. NWUPC is establishing the Framework Agreement as a central purchasing body for itself and its Members (Other Contracting Bodies (OCB)). NWUPC is managing this procurement process in accordance with the Public Contracts Regulations 2015 (the “Regulations”) on behalf of members of APUC, HEPCW, LUPC, NEUPC, NWUPC and SUPC.

The Framework Agreement will be split into three lots as follows:

Lot 1 – Defined Contribution Pension Scheme (Master Trust)

Lot 2 – Group Life Assurance & Group Income Protection

Lot 3 – Flexible Benefits Platform

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

Value excluding VAT: £19,000,000

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

## **II.2) Description**

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

Lot 1- Pension Scheme (Defined Contribution) Master Trust

Lot No

1

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

- 66131100 - Pension investment services
- 66141000 - Pension fund management services
- 66522000 - Group pension services
- 66523100 - Pension fund administration services

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

NUTS codes

- UK - United Kingdom

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

NWUPC is seeking to set up a section in a pre-existing authorised master trust as a tailored solution for Member Institutions of the participating consortia that can be used to meet (or exceed) automatic enrolment requirements as a minimum, to be available for H2 2025 eligibility. The scheme will be available to Member Institutions to enrol staff as defined by each Employer into the DC arrangement. This may include staff employed by the Member Institution or through a wholly owned subsidiary across both academic and academic-related posts and/or professional services. This may include new employees only or existing employees. The new DC arrangement could also be made available to staff in existing Defined Benefit schemes should they choose to opt-out of the existing scheme subject to the rules and regulations of the DB scheme.

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

Quality criterion - Name: Customer Requirements / Weighting: 85.00%

Price - Weighting: 15.00%

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

Start date

1 May 2025

End date

30 April 2032

This contract is subject to renewal

Yes

Description of renewals

This Framework Agreement will commence on 1st May 2025 for an initial period of five years until 30th April 2030 with the option to extend the Agreement for two years until 30th April 2032 subject to satisfactory Economic Operator performance.

### **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) Description**

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

Lot 2- Group Life Assurance & Group Income Protection

Lot No

2

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

- 66510000 - Insurance services
- 66511000 - Life insurance services
- 66512000 - Accident and health insurance services

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

NUTS codes

- UK - United Kingdom

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

The provision of Group Life Assurance and Group Income Protection to staff of participating consortia Member Institutions as an employee benefit. It will be at the discretion of the Member Institution which of the available policies they elect to take-up. This lot does not include a requirement for any insurance broking services.

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

Quality criterion - Name: Customer Requirements / Weighting: 75.00%

Price - Weighting: 25.00%

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

Start date

1 May 2025

End date

30 April 2032

This contract is subject to renewal

Yes

Description of renewals

This Framework Agreement will commence on 1st May 2025 for an initial period of five years until 30th April 2030 with the option to extend the Agreement for two years until 30th April 2032 subject to satisfactory Economic Operator performance.

## **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) Description**

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

Lot 3- Flexible Benefits Platform

Lot No

3

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

- 48000000 - Software package and information systems
- 75310000 - Benefit services
- 79900000 - Miscellaneous business and business-related services

**II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

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

The provision of a largely off the shelf flexible benefits platform for the management of employee benefits through a single centralised online platform that is customisable to the requirements of the participating consortia member institutions. The platform will offer a range of benefits that shall be available to employees who meet any relevant qualifying criteria established by the member institution. This will cover employees across the UK and may include employees overseas. The platform must be configurable and facilitate the incorporation of existing employee benefits and offer access to benefits from reputable providers. This lot covers the provision of all software and any associated licensing. Potential Services include, but are not limited to system implementation and migration, and professional services around the range of benefits the member institution may seek to make available to employees.

**II.2.5) Award criteria**

Quality criterion - Name: Customer Requirements / Weighting: 70.00%

Price - Weighting: 30.00%

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

Start date

1 May 2025

End date

30 April 2032



This contract is subject to renewal

Yes

Description of renewals

This Framework Agreement will commence on 1st May 2025 for an initial period of five years until 30th April 2030 with the option to extend the Agreement for two years until 30th April 2032 subject to satisfactory Economic Operator performance.

#### **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

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

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

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

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

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## Section IV. Procedure

### IV.1) Description

#### IV.1.1) Type of procedure

Open procedure

#### IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 3

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

See section VI Additional Information

#### IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

### IV.2) Administrative information

#### IV.2.1) Previous publication concerning this procedure

Notice number: [2024/S 000-035563](#)

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

Date

17 March 2025

Local time

1:00pm

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

English

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

Date

17 March 2025

Local time

2:00pm

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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

This framework agreement is offered on behalf of the UK Higher and Further Education Sector. The sector currently has access to a variety of Defined Benefit schemes and some institutions have existing DC Scheme provision. Engagement with the sector in scoping the agreement indicated interest in a centrally procured solution from 50 institutions. 10 have an immediate requirement to implement this within the first 12 months. The other interested institutions indicated varying degrees of readiness to implement the scheme throughout the stated duration of the agreement. Participating institutions are seeking value for money through a centralised procurement which leverages economies of scale. This is best achieved through a contract duration that facilitates scheme participation by all interested institutions, maximising assets and offering stability to the appointed provider to deliver competitive rates for the sector. The agreement duration recognises this and the lengthy governance and implementation processes that accompany the implementation of a DC Scheme in the sector. Lots 2 and 3 are complementary provisions to support the implementation of a Defined Contribution scheme within the sector and, as such, should be co-terminus. As value for money is a driver of the procurement, the Authority reserves the right to review the competitiveness of the scheme in any decision to extend.

The following organisations have committed to this procurement and intend to utilise the Framework Agreement as soon as possible after award. As such, the members and their wholly owned subsidiaries of the following Consortia may wish to utilise the Agreement and should have access at any point:

NWUPC <https://www.nwupc.ac.uk/our-members>

APUC <http://www.apuc-scot.ac.uk/#!/members>

HEPCW <https://www.hepcw.ac.uk/members/>

LUPC <https://www.lupc.ac.uk/member-list>

NEUPC <http://www.neupc.ac.uk/our-members>

SUPC <https://www.supc.ac.uk/about-us/our-members/our-members>

At some point during the life of the Framework Agreement, higher education providers registered by the Office for Students at the following link (OfS Register) may wish to utilise the Agreement and should have access at any point with the permission of NWUPC. This Agreement is not intended to replace any current Agreements that either participating or non-participating Institutions may already have in place.

The following individual Organisation (not its individual members) is also eligible to join the Framework Agreement:

Universities and Colleges Employers Association <http://www.ucea.ac.uk/>

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

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

NWUPC Ltd

Salford

M6 6FP

Country

United Kingdom