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Tender

## **LUV01197 Sole Trustee for PAS**

University of Leicester

F02: Contract notice

Notice identifier: 2024/S 000-009471

Procurement identifier (OCID): ocds-h6vhtk-044bfe

Published 22 March 2024, 4:05pm

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

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

University of Leicester

University of Leicester, University Road, Leicester

Leicester

LE1 7RH

#### **Contact**

Stewart Brewer

#### **Email**

[sab88@le.ac.uk](mailto:sab88@le.ac.uk)

#### **Telephone**

+44 1162525205

#### **Country**

United Kingdom

**Region code**

UKF21 - Leicester

**National registration number**

United Kingdom

**Internet address(es)**

Main address

<https://universityofleicester.delta-esourcing.com/>

Buyer's address

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

**I.3) Communication**

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

<https://www.delta-esourcing.com/tenders/UK-UK-Leicester:-Pension-services./X438QQ529F>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.delta-esourcing.com/tenders/UK-title/X438QQ529F>

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

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

Body governed by public law

**I.5) Main activity**

Education

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## **Section II: Object**

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

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

LUV01197 Sole Trustee for PAS

Reference number

LUV01197

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

- 66520000 - Pension services

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

Services

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

Sole Trustee and Secretary Services for University of Leicester Pension Assurance Scheme (PAS).

The University of Leicester is seeking to move to a sole trustee model for its legacy defined benefit pension scheme, the Pension and Assurance Scheme (PAS), during 2024.

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

Value excluding VAT: £250,000

#### **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
- 66522000 - Group pension services

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

NUTS codes

- UKF21 - Leicester

Main site or place of performance

Leicester

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

Sole Trustee and Secretary Services for University of Leicester Pension Assurance Scheme (PAS).

The University of Leicester is seeking to move to a sole trustee model for its legacy defined benefit pension scheme, the Pension and Assurance Scheme (PAS), during 2024.

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

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £250,000

### **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**

N/A

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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

Providing independent professional advice to the scheme and employer in line with the Standards and Code of Practices to deliver Sole Trusteeship:

oProfessional Standards ([appt.org.uk](http://appt.org.uk))

oAPPT CoP for Sole Trusteeships – final – APPT (Association of Professional Pension Trustees)

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

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

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

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

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

Providing independent professional advice to the scheme and employer in line with the Standards and Code of Practices to deliver Sole Trusteeship:

oProfessional Standards ([appt.org.uk](http://appt.org.uk))

oAPPT CoP for Sole Trusteeships – final – APPT (Association of Professional Pension Trustees)

### **III.2.2) Contract performance conditions**

As per ITT

### **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

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## **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

24 April 2024

Local time

12:00pm

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

English

#### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 6 (from the date stated for receipt of tender)

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

Date

29 April 2024

Local time

9:00am

Place

Leicester

Information about authorised persons and opening procedure

N/A

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: December 2028

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

For more information about this opportunity, please visit the Delta eSourcing portal at:

<https://www.delta-esourcing.com/tenders/UK-UK-Leicester:-Pension-services./X438QQ529F>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/X438QQ529F>

GO Reference: GO-2024322-PRO-25568056

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

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

University of Leicester

University Road

Leicester

LE1 7RH

Email

[procurement@le.ac.uk](mailto:procurement@le.ac.uk)

Telephone

+44 1162525205

Country

United Kingdom

Internet address

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

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

University of Leicester

University Road

Leicester

LE1 7RH

Email

[procurement@le.ac.uk](mailto:procurement@le.ac.uk)

Telephone

+44 1162525205

Country



United Kingdom

Internet address

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

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

University of Leicester

University Road

Leicester

LE1 7RH

Email

[procurement@le.ac.uk](mailto:procurement@le.ac.uk)

Telephone

+44 1162525205

Country

United Kingdom

Internet address

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