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Tender

## **SE Pension Scheme Trustee Services: Investment Consulting Service**

Scottish Enterprise

F02: Contract notice

Notice identifier: 2024/S 000-010117

Procurement identifier (OCID): ocds-h6vhtk-044dc7

Published 27 March 2024, 4:17pm

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

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

Scottish Enterprise

Atrium Court, 50 Waterloo Street

Glasgow

G2 6HQ

#### **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.3) Communication**

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

SE Pension Scheme Trustee Services: Investment Consulting Service

Reference number

P24-0106

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

- 66523000 - Pension fund consultancy services

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

Services

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

The Trustees of the Scottish Enterprise Pension & Life Assurance Scheme (the Scheme) are tendering to appoint a single supplier for provision of an Investment Consulting Service for the period 1st October 2024 to 30th September 2027 with the option to extend until 30th September 2028.

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

Value excluding VAT: £1,200,150

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

This contract is divided into lots: No

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

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

- 66131100 - Pension investment services
- 66141000 - Pension fund management services
- 66520000 - Pension services
- 66522000 - Group pension services

- 66523000 - Pension fund consultancy services

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

NUTS codes

- UKM - Scotland

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

The Trustees of the Scottish Enterprise Pension & Life Assurance Scheme (the Scheme) are to tender for the provision of a Investment Consulting Service for the period 1st October 2024 to 30th September 2027 with the option to extend until 30th September 2028. Parties believing they have appropriate capability should respond to this invitation to tender.

The Scheme Trustees are looking for a value for money provider, albeit quality of service and personnel will be as important as price.

The trustees are seeking a good mix of innovation and pragmatism in their service provider.

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

Quality criterion - Name: Added Value / Weighting: 19

Quality criterion - Name: Team capability and structure / Weighting: 18

Quality criterion - Name: Understanding of requirements / Weighting: 17

Quality criterion - Name: Methodology - features of approach / Weighting: 16

Quality criterion - Name: Operational management, management processes, efficiency of systems, risk management / Weighting: 10

Quality criterion - Name: Information Security / Weighting: 10

Quality criterion - Name: Business Continuity / Weighting: 5

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

Quality criterion - Name: Prompt Payment / Weighting: Pass/Fail

Price - Weighting: 40

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

Value excluding VAT: £1,200,150

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

It is anticipated that the contract will start on 1 October 2024 for a period of 36 months, with an option to extend for a further 12 months if required.

### **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**

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015.

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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 module.

Q4A1 - The bidder is required to be registered with the Financial Conduct Authority or equivalent.

#### **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 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 module.

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

#### **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

1 May 2024

Local time

11:00am

#### **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: 3 (from the date stated for receipt of tender)

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

Date

1 May 2024

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**

This is a relevant climate change contract, bidders are required to complete and return the attached Climate Change Plan template.

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=761305](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=761305).

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:761305)

Download the ESPD document here:

[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=761305](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=761305)

## **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

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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