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Contract

SE Pension Scheme Trustee Services: Investment Consulting Service

Scottish Enterprise

F03: Contract award notice

Notice identifier: 2024/S 000-022445

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

Published 19 July 2024, 11:10am

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

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

I.4) Type of the contracting authority

Regional or local Agency/Office

I.5) Main activity

Economic and financial affairs

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.1.6) Information about lots

This contract is divided into lots: No

II.1.7) Total value of the procurement (excluding VAT)

Value excluding VAT: £1,200,000

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.2.11) 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.

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.2.1) Previous publication concerning this procedure

Notice number: [2024/S 000-010117](#)

Section V. Award of contract

Contract No

P24-0106

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

19 July 2024

V.2.2) Information about tenders

Number of tenders received: 4

Number of tenders received from SMEs: 1

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 4

Number of tenders received by electronic means: 4

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

Isio

110 George Street

Edinburgh

EH2 4LH

Telephone

+44 7717643809

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

No

V.2.4) Information on value of contract/lot (excluding VAT)

Initial estimated total value of the contract/lot: £1,200,000

Total value of the contract/lot: £1,200,000

Section VI. Complementary information

VI.3) Additional information

THIS IS THE CONTRACT AWARD NOTICE.

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.]

(SC Ref:772942)

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

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

Telephone

+44 1412425466

Country

United Kingdom

Internet address

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