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Tender

## **Address Tracing and Mortality Screening – Member Data Services**

The City of Edinburgh Council

F02: Contract notice

Notice identifier: 2023/S 000-029159

Procurement identifier (OCID): ocds-h6vhtk-04079b

Published 3 October 2023, 4:52pm

The closing date and time has been changed to:

**6 November 2023, 2:00pm**

See the [change notice](#).

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

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

The City of Edinburgh Council

Waverley Court, 4 East Market Street

Edinburgh

EH8 8BG

#### **Email**

[Ben.Fulton@edinburgh.gov.uk](mailto:Ben.Fulton@edinburgh.gov.uk)

#### **Telephone**

+44 1315296432

## **Country**

United Kingdom

## **NUTS code**

UKM75 - Edinburgh, City of

## **Internet address(es)**

Main address

<http://www.edinburgh.gov.uk>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00290](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00290)

## **I.3) Communication**

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

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/esop/pts-host/public/pts/web/login.html>

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

Regional or local authority

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

General public services

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## **Section II: Object**

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

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

Address Tracing and Mortality Screening – Member Data Services

Reference number

CT1243

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

- 66141000 - Pension fund management services

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

Services

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

The Lothian Pension Fund require a range of Member Data Services to assist the with effective administration of their funds.

The two services required are address tracing and mortality screening this allows the Lothian Pension Fund to update member records with the member's correct address and to check the existence of members thus avoiding overpayment of benefits where pensioner members have deceased or alerting the Fund where deferred beneficiaries have died and a benefit may be payable.

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

Value excluding VAT: £125,000

#### **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
- 72416000 - Application service providers

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

NUTS codes

- UKM75 - Edinburgh, City of

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

The City of Edinburgh Council is acting on behalf of Lothian Pension Fund (“LPF”) in the execution of this Tender, but will not be party to the contract or the management of the contract through its lifetime.

LPF is the organisation responsible for administering the Local Government Pension Scheme in the Lothian area. Lothian Pension Fund administers the Local Government Pension Scheme (LGPS) in Edinburgh and the Lothians. LPF require a supplier to conduct Mortality Screening on all Lothian Pension Fund's pensioner and deferred members and to conduct address tracing on all untraced deferred members. This will be a recurring requirement, however through time the requirement may reduce.

The requirement is needed to improve the accuracy of member records in accordance with the Pensions Regulator's legislation on record keeping. In addition to improving their records, the service will improve the effectiveness of the communication between Lothian Pension Fund and its members, alerting members timeously with information about elections or choices they are required to make in relation to their benefits that may affect their rights under the scheme.

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

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

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

Start date

27 November 2023

End date

26 September 2028

This contract is subject to renewal

Yes

Description of renewals

The contract period will be for an initial 2 year period with the option to extend for a further 3 x12 month periods.

## **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**

List and brief description of selection criteria

Economic and financial standing Question 4B.1 Turnover

Economic and financial standing Question 4B.4 Ratios

Economic and financial standing Question 4B.5 Insurance

Minimum level(s) of standards possibly required

Economic and financial standing Question 4B.1 Turnover

Tenderers are required to have a minimum “general” annual turnover of GBP50,000 for the last two financial years. Where a Tenderer does not have an annual turnover of this value, the Council may exclude the Tenderer from the competition or may apply discretion seeking supporting evidence to determine the Tenderer’s suitability to proceed in the competition.

Economic and financial standing Question 4B.4 Ratios

Tenderers will be required provide the following information in response to 4B.4:

Current ratio for Current Year: 1:1.15

Current ratio for Prior Year: 1:1.15

The formula for calculating a Tenderer’s current ratio is current assets divided by current liabilities. The acceptable range for each financial ratio is greater than 1:1.15. Where a Tenderer’s current ratio is less than the acceptable value, the Council may exclude the Tenderer from the competition or may apply discretion seeking supporting evidence to determine the Tenderer’s suitability to proceed in the competition.

Economic and financial standing Question 4B.5 Insurance

Employer’s liability to at least to the level required by law

Public liability to GBP5,000,000 in respect of any one claim; no annual or total cap

Cyber Liability to GBP1,000,000 in respect of any one claim; no annual or total cap

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

List and brief description of selection criteria

Technical And Professional Ability 4C.1.2 Previous experience

Technical And Professional Ability 4C.4 Prompt Payment

Qualifications 4c.6 & 6.1 NCSC Cloud security

Minimum level(s) of standards possibly required

Technical And Professional Ability 4C.1.2 Previous experience

Please provide relevant examples of services carried out during the last three years as specified in the Contract Notice:

Tenderers are required to provide 2 examples of services carried out within the past three (3) years that demonstrate that they have the relevant experience to deliver services similar in scope, scale and duration to that described in the ITT and Tracing and Mortality Screening Procurement Specification document. Tenderers who fail to provide relevant examples of delivering similar services may be assessed as a FAIL and excluded from the procurement process.

Please download and complete the 'SPD Part 4C previous experience template'.

Technical And Professional Ability 4C.4 Prompt Payment

It is a mandatory requirement of this Contract that a prompt payment clause is present in all Contracts used in the delivery of the requirements. This ensures payment of subcontractors at all stages of the supply chain within 30 days and includes an obligation to provide a point of contact for subcontractors to refer to in the case of payment difficulties. This will require active monitoring of payment performance as well as the provision of evidence and reports to the Council on request or as contractually scheduled. Bidders should confirm that this condition will be met within the response to this question.

Qualifications 4c.6 & 6.1 NCSC Cloud security

The following educational and professional qualifications are held by the organisation itself:

The proposed solution must be accessed through a web browser and meet at least the NCSC Cloud security guidance.

See:

<https://www.ncsc.gov.uk/collection/cloudsecurity/implementingthecloudsecurityprinciples>

The supplier should be able to demonstrate they have in place the following:

Primary and backup hosting environments with SOC 2 type II accreditation

Business Continuity and disaster recovery plans

Annual penetration testing of the hosting environment

Change Management process

Patching and update plans/procedures

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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**

Originally published as:

Date

3 November 2023

Local time

2:00pm

Changed to:



Date

6 November 2023

Local time

2:00pm

See the [change notice](#).

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

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

Date

3 November 2023

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**

The City of Edinburgh Council are procuring this on behalf of Lothian Pension Fund.

The buyer is using PCS-Tender to conduct this ITT exercise. The Project code is 25307. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

(SC Ref:743239)

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

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

Sheriff Court

Sheriff Court House, 27 Chambers Street

Edinburgh

EH1 1LB

Country

United Kingdom

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

Precise information on deadline(s) for review procedures

Precise information on deadline(s) for review procedures:

An economic operator that suffers or risks suffering loss or damage attributable to a breach of duty under Public Contracts (Scotland) Regulations 2015 may bring proceedings in the Sheriff Court or Court of Session. . A claim for an ineffectiveness order must be made within 30 days of the Contract Award Notice being published in the Find a Tender Service /OJEU or within 30 days of the date those who expressed an interest in or otherwise bid for the contract were informed of the conclusion of the contract or in any other case within 6 months from the date on which the contract was entered into.