

United Kingdom-London: Pension services
OJ S 40/2020 26/02/2020
Contract award notice
Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: Southern Housing Group
Postal address: Fleet House, 59-61 Clerkenwell Road
Town: London
NUTS code: UK United Kingdom
Postal code: EC1M 5LA
Country: United Kingdom
Contact person: Gabriel Otubambo
E-mail: contracts@shgroup.org.uk
Telephone: +44 3003031061

Internet address(es):

Main address: <https://www.delta-esourcing.com/delta/>
Address of the buyer profile: www.shgroup.org.uk

I.4. Type of the contracting authority

Body governed by public law

I.5. Main activity

Housing and community amenities

Section II: Object

II.1. Scope of the procurement

II.1.1. Title

Pension Administration, Actuarial, Investment Consulting and Scheme Secretarial Services

II.1.2. Main CPV code

66520000 Pension services

II.1.3. Type of contract

Services

II.1.4. Short description

— a comprehensive pensions administration service and maintenance of comprehensive central records embracing active, deferred and pensioner members, deaths (including organising claiming of insured death benefits), transfers in and out, retirements, early retirements, annual renewal and issue of member benefit statements, AVCs (calculated on a monthly basis and unitised; liaison with pension payroll accordingly; instructing AVC provider on Trustee's behalf), calculation of pension increases, special benefits, etc. (including notification to members), provision and maintenance of an up to date administration manual,

- provide online access for members, detail relevant information in their pension and benefits,
- quarterly administration report including demonstration of achievement of agreed SLAs (Service Level Agreements) and including average SLAs plus including reference to the Pension Regulator's data cleaning requirements,
- retirement annuity bureau facility,
- attendance and part.

II.1.6. Information about lots

This contract is divided into lots: no

II.1.7. Total value of the procurement

Value excluding VAT: 720 000,00 GBP

II.2. Description

II.2.3. Place of performance

NUTS code: UK United Kingdom

Main site or place of performance: UNITED KINGDOM.

II.2.4. Description of the procurement

The Trustees wish to establish a contract for the provision of pension administration, actuarial, investment consulting and scheme secretarial services

The contract is not being divided into lots as the authority believes that the contract will be best delivered and managed by a single economic operator. The introduction of lots would introduce the need for higher internal resource. The Trustees also believe that they will achieve better value for money by appointing a single economic operator.

The provider will be managing the final salary pension plan, which is split into 2 closed defined pension schemes.

The 1964 Southern Housing Group Pension Plan section is the historic pension scheme with 37 active members which is now closed to new entrants. There are both contributing and non-contributing members of the scheme. The scheme also has 284 deferred members and 156 pensioners, and at its current triennial valuation as at 31.3.2018, its assets were valued at 45 000 000 GBP.

The 2017 Southern Housing Group Pension Plan section is a section which is closed to new entrants and which came into existence following the Group transferring out of the Social Housing Pensions Scheme (SHPS) in September 2017, with 20 active members. There are both contributing and non-contributing members of the scheme. The scheme also has 153 deferred members and 257 pensioners, and at its current triennial valuation as at 31.3.2018, its assets were valued at 17 800 000 GBP.

II.2.5. Award criteria

Quality criterion - Name: Method statement questions / Weighting: 50 %

Quality criterion - Name: Interview and presentation / Weighting: 10 %

Cost criterion - Name: Pricing schedule / 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

Please note that this is an award notice and not a new competition.

Section IV: Procedure

IV.1. Description

IV.1.1. Type of procedure

Restricted procedure

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

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 in the OJ S: [2019/S 082-195233](#)

IV.2.8. Information about termination of dynamic purchasing system

IV.2.9. Information about termination of call for competition in the form of a prior information notice

Section V: Award of contract

A contract/lot is awarded: yes

V.2. Award of contract

V.2.1. Date of conclusion of the contract

25/10/2019

V.2.2. Information about tenders

Number of tenders received: 11

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

V.2.3. Name and address of the contractor

Official name: KPMG LLP

Postal address: 15 Canada Square

Town: London

NUTS code: UK United Kingdom

Postal code: E14 5GL

Country: United Kingdom

The contractor is an SME: no

V.2.4. Information on value of the contract/lot

Total value of the contract/lot: 720 000,00 GBP

V.2.5. Information about subcontracting

Section VI: Complementary information

VI.3. Additional information

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=475898095>

GO Reference: GO-2020224-PRO-16055256

VI.4. Procedures for review

VI.4.1. Review body

Official name: Royal Court of Justice

Postal address: The Strand

Town: London

Postal code: WC2 2LL

Country: United Kingdom

Telephone: +44 2079476000

VI.4.2. Body responsible for mediation procedures

Official name: Centre for Effective Dispute Resolution (CEDR)

Postal address: 70 Fleet Street

Town: London

Postal code: EC4Y 1EU

Country: United Kingdom

Telephone: +44 2075366000

VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

The contracting authority complied with the requirements of the Public Contracts Regulations 2015 (which incorporates Directive 2014/24/EU into English Law) when notifying economic operators of the outcome of this procurement.

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

Official name: Cabinet Office

Postal address: 70 Whitehall

Town: London

Postal code: SW1A 2AS

Country: United Kingdom

Telephone: +44 2072761234

VI.5. Date of dispatch of this notice

24/02/2020