

**United Kingdom-London: Pension services**  
**OJ S 82/2019 26/04/2019**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**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](mailto:contracts@shgroup.org.uk)  
**Internet address(es):**  
Main address: <https://www.delta-esourcing.com/delta/>  
Address of the buyer profile: [www.shgroup.org.uk](http://www.shgroup.org.uk)

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <http://www.delta-esourcing.com/tenders/UK-UK-London:-Pension-services./8583J27KE6>  
Additional information can be obtained from the abovementioned address  
Tenders or requests to participate must be submitted to the abovementioned address

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

Body governed by public law

**I.5. Main activity**

Housing and community amenities

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**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.1.5. Estimated total value**

Value excluding VAT: 720 000,00 GBP

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

This contract is divided into lots: no

### **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**

Criteria below

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

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

Cost criterion - Name: Pricing schedule / Weighting: 40 %

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

Value excluding VAT: 720 000,00 GBP

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

Duration in months: 60

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract is for an initial period of 5 years (60 months) extendable by 5 years (60 months).

#### **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**

To respond to this opportunity please click here: <https://www.delta-esourcing.com/respond/8583J27KE6>

### **Section III: Legal, economic, financial and technical information**

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#### **III.1. Conditions for participation**

##### **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

### **Section IV: Procedure**

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#### **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.2.2. Time limit for receipt of tenders or requests to participate**

Date: 07/06/2019 Local time: 14:00

##### **IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

Date: 20/06/2019

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

### **Section VI: Complementary information**

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

This is a recurrent procurement: no

#### **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. GO Reference: GO-2019423-PRO-14827670

#### **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.4.4. 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**

23/04/2019