

**United Kingdom-Edinburgh: Pension fund administration services**  
**OJ S 104/2017 01/06/2017**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: The City of Edinburgh Council

Postal address: Waverley Court, 4 East Market Street

Town: Edinburgh

NUTS code: UKM25 Edinburgh

Postal code: EH8 8BG

Country: United Kingdom

E-mail: [brian.mccreadie@edinburgh.gov.uk](mailto:brian.mccreadie@edinburgh.gov.uk)

Telephone: +44 1314693543

**Internet address(es):**

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

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00290](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00290)

**I.1. Name and addresses**

Official name: Falkirk Council

Postal address: Municipal Buildings, West Bridge Street

Town: Falkirk

NUTS code: UKM26 Falkirk

Postal code: FK1 5RS

Country: United Kingdom

E-mail: [purchasing@falkirk.gov.uk](mailto:purchasing@falkirk.gov.uk)

Telephone: +44 1324506566

**Internet address(es):**

Main address: <http://www.falkirk.gov.uk>

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00184](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00184)

**I.1. Name and addresses**

Official name: Fife Council

Postal address: Fife House, North Street

Town: Glenrothes

NUTS code: UKM22 Clackmannanshire and Fife

Postal code: KY7 5LT

Country: United Kingdom

E-mail: [enquiry.procurement@fife.gov.uk](mailto:enquiry.procurement@fife.gov.uk)

Telephone: +44 3451550000

**Internet address(es):**

Main address: <http://www.fifedirect.org.uk>

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00187](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00187)

**I.1. Name and addresses**

Official name: Scottish Borders Council

Postal address: Council Headquarters

Town: Newtown St Boswells

NUTS code: UK United Kingdom

Postal code: TD6 0SA

Country: United Kingdom

E-mail: [procurement@scotborders.gov.uk](mailto:procurement@scotborders.gov.uk)

Telephone: +44 1835824000

Fax: +44 1835825150

**Internet address(es):**

Main address: <http://www.scotborders.gov.uk>

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00394](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00394)

**I.1. Name and addresses**

Official name: Shetland Islands Council

Postal address: 8 North Ness Business Park

Town: Lerwick

NUTS code: UKM66 Shetland Islands

Postal code: ZE1 0LZ

Country: United Kingdom

E-mail: [contract.admin@shetland.gov.uk](mailto:contract.admin@shetland.gov.uk)

Telephone: +44 1595744595

Fax: +44 1595744667

**Internet address(es):**

Main address: [www.shetland.gov.uk](http://www.shetland.gov.uk)

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00402](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00402)

**I.1. Name and addresses**

Official name: Dundee City Council

Postal address: Dundee House, 50 North Lindsay Street

Town: Dundee

NUTS code: UKM21 Angus and Dundee City

Postal code: DD1 1NZ

Country: United Kingdom

E-mail: [eprocurement@dundeecity.gov.uk](mailto:eprocurement@dundeecity.gov.uk)

Telephone: +44 1382434000

Fax: +44 1382433045

**Internet address(es):**

Main address: [www.dundeecity.gov.uk](http://www.dundeecity.gov.uk)

Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00220](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00220)

**I.1. Name and addresses**

Official name: Strathclyde Pension Fund

Postal address: c/o Glasgow City Council, 6th Floor, Capella Building, 60 York Street

Town: Glasgow  
NUTS code: UKM34 Glasgow City  
Postal code: G2 8JX  
Country: United Kingdom  
E-mail: [linda.welsh@glasgow.gov.uk](mailto:linda.welsh@glasgow.gov.uk)  
Telephone: +44 1412875186

**Internet address(es):**

Main address: <http://www.spfo.org.uk/>  
Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA19122](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA19122)

**I.1. Name and addresses**

Official name: The Highland Council  
Postal address: Council Headquarters, Glenurquhart Road  
Town: Inverness  
NUTS code: UKM62 Inverness & Nairn and Moray, Badenoch & Strathspey  
Postal code: IV3 5BX  
Country: United Kingdom  
E-mail: [charlie.maccallum@highland.gcsx.gov.uk](mailto:charlie.maccallum@highland.gcsx.gov.uk)  
Telephone: +44 1463702000

**Internet address(es):**

Main address: <http://www.highland.gov.uk/>  
Address of the buyer profile: [http://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00045](http://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00045)

**I.2. Information about joint procurement**

The contract involves joint procurement

**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 abovementioned address  
Tenders or requests to participate must be submitted electronically via: [www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

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

Regional or local authority

**I.5. Main activity**

General public services

**Section II: Object**

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

**II.1.1. Title**

Integrated Pension Administration and Payroll Software System.  
Reference number: CT0400

**II.1.2. Main CPV code**

66523100 Pension fund administration services

**II.1.3.**

## **Type of contract**

Services

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

In order to administer the Local Government Pension Scheme (LGPS) in Scotland, LPF requires an integrated pension administration and payroll software system to provide benefit entitlement calculations and payments in compliance with relevant LGPS Regulations. The Statement of Requirements document provides a detailed description, including technical requirements, of the proposed service.

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

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

This contract is divided into lots: no

## **II.2. Description**

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

66523100 Pension fund administration services, 48812000 Financial information systems, 66520000 Pension services, 66521000 Individual pension services

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

NUTS code: UKM Scotland

Main site or place of performance: Scotland.

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

The City of Edinburgh Council (The Council) is the administering authority of the Local Government Pension Scheme (LGPS) in Scotland for the Lothian area. Lothian Pension Fund (LPF), which is not a separate legal entity from the Council, carries out the specialist activities of investing the assets (approximately 6 000 000 000 GBP) and administering the benefits of three funds — Lothian Pension Fund, Lothian Buses Pension Fund and Scottish Homes Pension Fund — on behalf of over 100 contributing employers and over 80 000 members. Where stated 'LPF' this refers to all the 3 funds.

In order to administer the Local Government Pension Scheme (LGPS) in Scotland, LPF requires an integrated pension administration and payroll software system to provide benefit entitlement calculations and payments in compliance with relevant LGPS Regulations. The proposed contract is primarily intended for use by The City of Edinburgh Council, in its role as administering authority of the Local Government Pensions Scheme (LGPS) in Scotland for the Lothian region. However, bidders should note that The City of Edinburgh Council took the decision to offer all other Scottish LGPS's the opportunity to make use of the proposed service at some point in the future when their current arrangements expire.

The following other LGPS pension funds have indicated that they may wish to enter into an agreement with the successful supplier when their current arrangements end:

- Falkirk Council Pension Fund,
- Fife Council Pension Fund,
- Highlands Pension Fund,
- Scottish Borders Council Pension Fund,
- Shetland Islands Council Pension Fund,
- Strathclyde Pension Fund,
- Tayside Pension Fund.

Bidders should note that, although the LGPS's named above have indicated an interest in possibly entering into similar agreements with the successful Contractor for delivery of the

service when their current arrangements expire, they are under no obligation to do so. Similarly, in the event that, for any reason, the Contractor does not wish to participate in such an arrangement, they will retain a 'Right of Refusal' to enter into any such contract with any other Scottish LGPS.

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

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

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

Duration in months: 168

This contract is subject to renewal: yes

Description of renewals:

The original contract will be for a duration of 10 years, with options to extend for 2 further periods of 2 years each, giving a total maximum contract duration of 14 years.

#### **II.2.9. Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 6  
Objective criteria for choosing the limited number of candidates :

Objective criteria for choosing the limited number of candidates is as described in the ESPD and Instructions Documents.

#### **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**

### **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

#### **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**

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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.2.1. Previous publication concerning this procedure**

Notice number in the OJ S: [2016/S 132-237503](#)

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

Date: 29/06/2017 Local time: 12:00

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

Date: 10/07/2017

##### **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**

Tender must be valid until: 31/05/2018

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

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##### **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**

Those bidders invited to Stage 2 may also wish to note that when submitting their pricing proposals they will be required to identify and include specific details of LPF's 'in house' staff resources (by job role and man hours involved for each) which they anticipate LPF will require in order to conduct all necessary UAT of their proposed system solution. These UAT staff resourcing costs will be included as part of the bidder's overall pricing proposal when evaluating the Pricing Schedules submitted by bidders. Any prospective bidders who may have any concerns regarding the Council's proposed approach to this procurement exercise are advised to submit clear and comprehensive details of their concerns, in writing, to the Council via the Question and Answer facility on the PCS web portal within 30 days of the publication of this Tender Notice.

Note: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at [http://www.publiccontractsscotland.gov.uk/Search/Search\\_Switch.aspx?ID=497713](http://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=497713).

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at [http://www.publiccontractsscotland.gov.uk/sitehelp/help\\_guides.aspx](http://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:497713)

Download the ESPD document here: [http://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=497713](http://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=497713)

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

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

Official name: The City of Edinburgh Council  
Postal address: Waverley Court, 4 East Market Street  
Town: Edinburgh  
Postal code: EH8 8BG  
Country: United Kingdom  
Telephone: +44 1314693543  
Internet address: <http://www.edinburgh.gov.uk>

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

Precise information on deadline(s) for review procedures:

A tenderer that suffers loss as a result of a breach of duty under the Public Contracts (Scotland) Regulations 2015 may bring proceedings in the Sheriff Court or the Court of Session. The City of Edinburgh Council (the Council) will have a minimum standstill period of 10 days before awarding the contract. The communication of the award decision notice will be sent by fax or e-mail to all tenderers with the standstill period commencing on the next day. If proceedings are started in the Sheriff Court or the Court of Session against the Council in respect of the decision to award the contract within the standstill period then the Council is prevented from awarding the contract. Post contract award the Sheriff Court or the Court of Session may (1) award damages provided proceedings are brought within 3 months from the date when the grounds for the bringing of the proceedings first arose (2) be entitled to issue an ineffectiveness order or impose a financial penalty on the Council. A claim for an ineffectiveness order must be made within 30 days of the Contract Award Notice being published in the 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.

##### **VI.5. Date of dispatch of this notice**

30/05/2017