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**United Kingdom-Norwich: Pension investment services
2017/S 008-012793**

Contract award notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1) Name, addresses and contact point(s)

Norfolk County Council
County Hall, Martineau Lane
For the attention of: Julie Ward
NR1 2DH Norwich
United Kingdom
E-mail: sourcingteam@norfolk.gov.uk

Internet address(es):

General address of the contracting authority: www.norfolk.gov.uk
Address of the buyer profile: <http://in-tend.co.uk/norfolkcc.aspx/Home>

I.2) Type of the contracting authority

Regional or local authority

I.3) Main activity

General public services

I.4) Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: yes
The Environment Agency, City of Wolverhampton Council, City of Edinburgh Council, London Borough of Hackney, Bradford Metropolitan District Council, Lancashire, Lincolnshire, Nottinghamshire and Suffolk County Council and Wirral Borough Council

Section II: Object of the contract

II.1) Description

II.1.1) Title attributed to the contract

A Multi-Provider Framework Agreement for the Provision of Stewardship Advisory Services.

II.1.2) Type of contract and location of works, place of delivery or of performance

Services
Service category No 27: Other services
NUTS code UK

II.1.3) Information about a framework agreement or a dynamic purchasing system (DPS)

The notice involves the establishment of a framework agreement

II.1.4) Short description of the contract or purchase(s)

This procurement has been split into 5 Lots, providers may bid for any or all lots.
Lot 1 — Voting Services.
Lot 2 — Engagement Services.

Lot 3 — Voting and Engagement Services.

Lot 4 — Stewardship Research and Data Services.

Lot 5 — Stewardship-related project services.

No Guarantee of business is given.

II.1.5) **Common procurement vocabulary (CPV)**

66131100, 66520000, 66523000, 75320000, 66141000

II.1.6) **Information about Government Procurement Agreement (GPA)**

The contract is covered by the Government Procurement Agreement (GPA): no

II.2) **Total final value of contract(s)**

II.2.1) **Total final value of contract(s)**

Section IV: Procedure

IV.1) **Type of procedure**

IV.1.1) **Type of procedure**

Open

IV.2) **Award criteria**

IV.2.1) **Award criteria**

The most economically advantageous tender in terms of

1. Quality. Weighting 80

2. Price. Weighting 20

IV.2.2) **Information about electronic auction**

An electronic auction has been used: no

IV.3) **Administrative information**

IV.3.1) **File reference number attributed by the contracting authority**

NCCT40936

IV.3.2) **Previous publication(s) concerning the same contract**

Prior information notice

Notice number in the OJEU: [2015/S 182-328611](#) of 16.9.2015

Contract notice

Notice number in the OJEU: [2016/S 120-213874](#) of 24.6.2016

Section V: Award of contract

Contract No: NCCT40936 — Lot 1

Lot No: 1 - Lot title: Voting Services

V.1) **Date of contract award decision:**

V.2) **Information about offers**

Number of offers received: 7

V.3) **Name and address of economic operator in favour of whom the contract award decision has been taken**

Please see additional information V1.2

V.4) **Information on value of contract**

V.5) **Information about subcontracting**

The contract is likely to be sub-contracted: no

Contract No: NCCT40936 — Lot 2

Lot No: 2 - Lot title: Engagement Services

- V.1) **Date of contract award decision:**
- V.2) **Information about offers**
Number of offers received: 8
- V.3) **Name and address of economic operator in favour of whom the contract award decision has been taken**
Please see additional information V1.2
- V.4) **Information on value of contract**
- V.5) **Information about subcontracting**
The contract is likely to be sub-contracted: no

Contract No: NCCT40936 Lot 3

Lot No: 3 - Lot title: Voting and Engagment Services

- V.1) **Date of contract award decision:**
- V.2) **Information about offers**
Number of offers received: 5
- V.3) **Name and address of economic operator in favour of whom the contract award decision has been taken**
Please see additional information V1.2
- V.4) **Information on value of contract**
- V.5) **Information about subcontracting**
The contract is likely to be sub-contracted: no

Contract No: NCCT40936 Lot 4

Lot No: 4 - Lot title: Stewardship Research and Data Services

- V.1) **Date of contract award decision:**
- V.2) **Information about offers**
Number of offers received: 7
- V.3) **Name and address of economic operator in favour of whom the contract award decision has been taken**
Please see additional information V1.2
- V.4) **Information on value of contract**
- V.5) **Information about subcontracting**
The contract is likely to be sub-contracted: no

Contract No: NCCT40936 Lot 5

Lot No: 5 - Lot title: Stewardship-related project Services

- V.1) **Date of contract award decision:**
- V.2) **Information about offers**
Number of offers received: 8
- V.3) **Name and address of economic operator in favour of whom the contract award decision has been taken**
Please see additional information V1.2
- V.4) **Information on value of contract**
- V.5) **Information about subcontracting**
The contract is likely to be sub-contracted: no

Section VI: Complementary information

- VI.1) **Information about European Union funds**
The contract is related to a project and/or programme financed by European Union funds: no

VI.2) **Additional information:**

Norfolk County Council on its own behalf and on behalf of The Environment Agency, City of Wolverhampton Council, City of Edinburgh Council, London Borough of Hackney, Bradford Metropolitan District Council, Lancashire County Council, Lincolnshire County Council, Nottinghamshire County Council, Suffolk County Council and Wirral Borough Council has let a Multi Provider Framework agreement for Stewardship Advisory Services.

This framework may also be used by:

- any LGPS administering authorities and any of their participating employing authorities as defined in the Local Government Pension Scheme Regulations 2013 SI2013 No.2356 (as amended) and the Local Government Pension Scheme (Administration) (Scotland) Regulations 2008 as amended by SSI 2011/349;
- the Committee (the NILGOSC) and employing authorities as defined in the Local Government Pension Scheme (Administration) Regulations (Northern Ireland) 2009 / SRNI 2009/33;
- the Board of the Pension Protection Fund <http://www.pensionprotectionfund.org.uk>
- any other administering authority or organisation of a public sector pension scheme or any public sector body that requires pensions related services; and
- any Common Asset Pool or Collective Investment Vehicle established by or on behalf of an administering authority or group of administering authorities; any Local Government Pension Fund(s) or groups of Pension Funds; or any bodies, organisations or companies established by them for the purpose of operating on a collective basis.

Name and address of economic operators appointed to the framework.

Lot 1:

GES International, 141 -142 Fenchurch Street, 6th Floor, London, EC3M 6BL.

Glass Lewis Europe T/A Glass Lewis & Co LLC, 15 Henry Street, Limerick, Ireland.

Manifest information Services Ltd, 9 Freebournes Court, Newland Street, Witham, CM8 2BL.

Pension & Investment Research Consultants, Exchange Tower, 2 Harbour Exchange Square, London, E14 9GE.

Robeco United Kingdom T/A Robeco Institutional Asset Management B.V, Augustine House, 6A Austin Friars, London, EC2N 2HA.

Lot 2:

F & C Management Ltd T/A as BMO Global Asset Management, Exchange House, Primrose Street, London, EC2A 2NY.

Ethical Investment Research Services Ltd T/A Vigeo Eiris, The Foundry, 17 Oval Way, London, SE11 5RR.

GES International, 141 -142 Fenchurch Street, 6th Floor, London, EC3M 6BL.

Hermes Equity Ownership Services Ltd T/A Hermes EOS, Lloyds Chambers, 1 Portsoken Street, London, E1 8HZ.

Pension & Investment Research Consultants, Exchange Tower, 2 Harbour Exchange Square, London, E14 9GE.

Robeco United Kingdom T/A Robeco Institutional Asset Management B.V, Augustine House, 6A Austin Friars, London, EC2N 2HA.

Lot 3:

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Pension & Investment Research Consultants, Exchange Tower, 2 Harbour Exchange Square, London, E14 9GE.

Robeco United Kingdom T/A Robeco Institutional Asset Management B.V, Augustine House, 6A Austin Friars, London, EC2N 2HA.

Lot 4:

Ethical Investment Research Services Ltd T/A Vigeo Eiris, The Foundry, 17 Oval Way, London, SE11 5RR.

FTSE International Ltd T/A FTSE Russell, 10 Paternoster Square, London, EC4M 7LS.

MSCI ESG Research Inc, Ninth Floor, Ten Bishops Square, London, E1 6EG.

oekom research AG T/A oekom research AG ('oekom'), 166 rue St Denis, Paris, 75002.

Sustainalytics T/A Sustainalytics UK Ltd, St Katherine Dock, 1 Thomas More Square, London, E1W 1YN.

Lot 5:

Ethical Investment Research Services Ltd T/A Vigeo Eiris, The Foundry, 17 Oval Way, London, SE11 5RR.

Manifest information Services Ltd, 9 Freebournes Court, Newland Street, Witham, CM8 2BL.

Mercer Ltd, Tower Place West, London, EC3R 5BU.

oekom research AG T/A oekom research AG ('oekom'), 166 rue St Denis, Paris, 75002.

Pension & Investment Research Consultants, Exchange Tower, 2 Harbour Exchange Square, London, E14 9GE.

Sustainalytics T/A Sustainalytics UK Ltd, St Katherine Dock, 1 Thomas More Square, London, E1W 1YN.

VI.3) **Procedures for appeal**

VI.3.1) **Body responsible for appeal procedures**

VI.3.2) **Lodging of appeals**

Precise information on deadline(s) for lodging appeals: Norfolk County Council incorporated a standstill period at the point information on the proposed award of the framework agreements was communicated to tenderers. That notification provided full information on the award decision. The standstill period, which ran for 10 calendar days, provided time for unsuccessful tenderers to challenge the award decision before the framework agreements were entered into. The Public Contracts Regulations 2015 (as amended) provide for aggrieved parties who have been harmed or are at risk of harm by a breach of the rules to take action in the High Court (England, Wales and Northern Ireland).

VI.3.3) **Service from which information about the lodging of appeals may be obtained**

VI.4) **Date of dispatch of this notice:**

10.1.2017