

QUALIFICATION QUESTIONNAIRE

CONTRACT

Title of competition:	Provision of DC Pension Master Trust Services
Contracting Entity:	Dublin Port Company
Procedure:	Negotiated Procedure
eTenders Reference (CfT Resource ID):	8419755
Issue Date:	Thursday 18 th June 2026
Closing date and time for Queries:	Monday 6 th July 2026 (12:00 hours)
Closing date and time for submission of completed questionnaires:	Monday 20 th July 2026 (12:00 hours)
Submission of Queries via:	Messaging facility on eTenders only.
Submission of completed questionnaires:	Electronic submission facility on eTenders only.

Notes:

- Please note that information relating to this qualification stage, including clarifications and changes, will be published on the Irish Government's online Portal 'eTenders' (www.etenders.gov.ie). Registration is free of charge and there is no charge for documents. Please note that the Contracting Entity accepts no responsibility for information relayed (or not relayed) via third parties.
- For the avoidance of doubt, it is emphasised that the information requested in this questionnaire is aimed solely at determining the suitability and choice of Candidates for the next stage of the competition.
- For responding to this Qualification Questionnaire, please complete **Part B (Qualification Response Document)** which is available on eTenders.
- Please upload your response as a **ZIP FILE** to protect the integrity of the file names.

Contents

PART A – COMPETITION OVERVIEW	4
Disclaimer	4
Use of eTenders	4
Use of a Questionnaire Response Document	5
1 About the Contracting Entity.....	6
1.1 The Contracting Entity.....	6
1.2 Small and Medium Enterprise participation	6
1.3 Multiple Participation	7
2 About the Procurement Procedure	8
2.1 The Negotiated Procedure	8
3 About the Contract	9
3.1 Scope of Requirements.....	9
3.1.1 Scope of the Contract	9
3.1.2 Intentionally deleted	10
3.2 Intentionally deleted	10
3.3 Intentionally deleted	10
3.4 Duration of the Contract	10
3.5 Estimated Value of the Contract.....	10
3.6 Intentionally deleted	10
3.7 Anticipated Timeline	10
3.8 Intentionally deleted	11
3.9 Award to Runner up	11
3.10 Intentionally deleted	11
4 Instructions to Candidates	12
4.1 Queries	12
4.2 Submission of Applications.....	12
4.2.1 Accessing documents.....	13
4.2.2 Submitting your Response	13
4.3 Closing date for Applications	13
4.4 Completing the Qualification Questionnaire	14
4.5 Reliance on other Entities	14
4.6 European Single Procurement Document (ESPD).....	15
4.7 Evaluation of Applications	16
4.8 Clarification of Applications.....	16

4.9	Identification of Tender List.....	16
4.10	Freedom of Information Act	16
4.11	International Procurement Instrument	16
4.12	Foreign Subsidies Regulation	17
4.13	Interference	17
4.14	Inducement to Purchase.....	17
4.15	Access to Information on the Environment	17
4.16	Withholding Tax.....	18
4.17	Intentionally deleted.....	18
4.18	DPC Supplier Code of Conduct (SCoC)	18
4.19	TUPE Information (Acquired Rights) (where applicable).....	18
5	Questionnaire Summary	18

PART A – COMPETITION OVERVIEW

Disclaimer

This document issued herewith (“the Document”) is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

Candidates are recommended to read the documents thoroughly. While all reasonable steps have been taken to ensure that the information set out in the Document is accurate and up to date, no representation or warranty, express or implied, is or will be made or given in relation to the accuracy or the completeness of any information contained in the Document or otherwise provided by or on behalf of the Contracting Entity (in writing or otherwise) to any interested party or its advisers. No responsibility or liability for any loss or damage arising as a result of reliance on these documents, or for the information contained in these documents or for any omission is or will be accepted by the Contracting Entity or by any of its officers, employees, agents or professional advisers. No officer, employee, agent, or professional adviser of the Contracting Entity has any authority to give or make any representation or warranty, express or implied, in relation to such information. The Contracting Entity’s officers, employees, agents, and professional advisers expressly disclaim any and all liability arising out of such documentation or information and any errors or omissions in or from the documents and information.

At its absolute discretion, the Contracting Entity may elect to terminate this procurement process at any time, or any contract awarded in accordance with the agreed termination provisions of the contract.

Candidates are advised that the Contracting Entity is not currently subject to the Freedom of Information (FOI) Act, 2014; however, it may in the future. If a Candidate considers that any of the information supplied in their response is either commercially sensitive or confidential in nature, this should be highlighted and the reasons for its sensitivity specified. In the event the Contracting Entity receives a Freedom of Information request relating to information identified as sensitive or confidential, the Contracting Entity will consult with the relevant Candidate before making a decision on disclosure. However, the final decision as to whether any information disclosed shall rest with the Contracting Entity in accordance with the FOI Act.

Use of eTenders

Please note that information relating to this Qualification Questionnaire, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal www.etenders.gov.ie. Registration is free of charge and there is no charge for documents. Please note that the Contracting Entity accepts no responsibility for information relayed (or not relayed) via third parties. In order to submit a response, it is mandatory to have **ASSOCIATED** your company with the competition using the eTenders log in.

For all up to date information on using eTenders, please refer to the Guidance Material on eTenders: <https://www.etenders.gov.ie/epps/home.do>

eTenders system usage queries are managed by eTenders Technical Support: <https://www.etenders.gov.ie/epps/PrepareContactUsAction.do>

Use of a Questionnaire Response Document

The Contracting Entity has provided a **Questionnaire Response Document** as a separate document for Candidates to use in preparing their response (Part B). This document and format must be used. Candidates should note that personalisation of the Questionnaire Response Document is not allowed, and they must not add their branding/colours to the Questionnaire Response Document.

Please note that in addition to this Document and the Response Document, **any Clarification documents** issued by the Contracting Entity during the qualification submission period forms part of the Qualification Questionnaire. Candidates must ensure they regularly monitor eTenders and review any Clarification documents published.

The Contracting Entity will not click on any web links in the responses, so Candidates cannot assume that any material contained in web links will be viewed. Where Candidates submit additional material such as brochures or appendices, they must specifically highlight the information they consider is relevant to their application and clearly explain which criterion it relates to. The Contracting Entity is under no obligation to parse through such material seeking information relevant to the response.

It is recommended to upload your response as a **Zip file** in order to protect the integrity of file names.

1 About the Contracting Entity

1.1 The Contracting Entity

Dublin Port Company (hereinafter referred to as the “Contracting Entity”) is the authority responsible for this procurement. The Contracting Entity is a self-financing Designated Activity Company (DAC) wholly owned by the State, whose business is the management of Dublin Port, Ireland’s premier port. Established as a corporate entity in 1997, the Contracting Entity is responsible for the management, control, operation and development of the port, whilst providing facilities, services accommodation, and lands within the harbour for the use of ships, goods and passengers.

The Contracting Entity utilises several terminals to serve the travelling public and import and export cargo. Total throughput for 2025 was circa 36 million gross tonnes for the year, with 6,649 ship arrivals. On the passenger side, 1.7 million travelled through the port in 2025.

The Contracting Entity has in place a Masterplan to guide the development of Dublin Port in the period up to 2040. The Masterplan presents a vision for future operations at the Port and critically examines how the existing land use can be optimised for merchandise trade purposes. The two main objectives of the Masterplan are capacity building and Port City Integration.

Dublin Port, through its strategic key objectives underpinning the Masterplan, which was reviewed and republished in 2018, is committed to:

- Integrating new development with the built and natural landscapes of the surrounding area.
- Enhancing the natural and built environments and being integrated with the city.
- Promoting sustainable design in the natural and built environment.
- To promote the development of future Port facilities the principles of Universal Design to make environments inherently accessible for those with and without disabilities.
- A promotion of excellence and focus on good quality in design.

Further information is available at our corporate website <https://www.dublinport.ie/>

1.2 Small and Medium Enterprise participation

It is the policy of the Contracting Entity to promote participation by Small and Medium Enterprises (SMEs) on a fair and equal basis.

Candidates are encouraged to explore the possibilities of forming relationships with SMEs or with larger enterprises to meet the financial, economic or technical capacity requirements of the competition, if required.

Larger enterprises are also encouraged, subject to this paragraph, to consider the practical ways that SMEs can be included in their proposals to maximise the social and economic benefits of any Services Contracts that may result from this Competition. Candidates may include individuals, partnerships, limited companies, groupings or any combination of the foregoing with or without legal personality. However, a grouping if successful may be required to establish legal personality to enter the framework agreement/contract.

Candidates are reminded that they may rely on the resources of other entities to establish the requirements on condition that they can prove to the satisfaction of the Contracting Entity that they will have these resources at their disposal when necessary.

If the application is from a consortium/joint venture or other grouping, Candidates must ensure that all the relevant information is provided and where necessary, provide the information requested separately for each party. Relevant information relates to where a Candidate is relying on the resources to qualify (e.g. turnover, personnel, previous experience) and or to deliver contracts. The consortium must appoint a single point of contact who will assume overall responsibility for delivery, and who is authorised to sign the contract on behalf of all members. The Contracting Entity will not act as an arbitrator between members of the grouping.

1.3 Multiple Participation

If any individual member of a Candidate grouping is included in more than one application for this competition, the lead must provide a statement declaring that they are aware of this 'multiple participation' and confirm that the individual member has brought their multiple participation to the attention of all the groupings they belong to. Depending on the situation, the Contracting Entity may take all appropriate steps and/or request the Candidate to take whatever action is necessary, in order to avoid any conflict of interest or a distortion of competition to the satisfaction of the Contracting Entity.

2 About the Procurement Procedure

2.1 The Negotiated Procedure

The Contracting Entity is employing the Negotiated Procedure as catered for under Directive 2014/25/EU.

The procedure involves a number of stages:

- **Qualification Phase (this Phase)**
The Qualification Phase will be used to short-list potential Candidates based on the quality of responses submitted to this questionnaire. It is anticipated that the five (5) highest-scoring Candidates (subject to sufficient qualifying submissions) will be invited to tender.
- **Tender Stage**
Those invited to tender, will be issued with a minimum based specification, award criteria and pricing documents and invited to submit tenders.
The Contracting Entity will evaluate those tenders against the award criteria and reserves the right to:
 - (a) Move straight to a contract award decision, without negotiation.
 - (b) To invite the top scoring Tenderer to a negotiation.
 - (c) To invite all firms to negotiation meetings.
 - (d) To apply the successive reduction rule to reduce the number of firms invited to the negotiation phase – the selection of firms may be based on scenarios where firms have failed to qualify under one or more of the award criteria and/or situations where there is a clear score differential following evaluation of the initial tenders.
- **The Negotiation Stage**
 - Tenderers may be invited at the discretion of the Contracting Entity to attend a negotiation meeting at which all aspects of the tender submitted may be discussed, including costs. These tenderers will be accorded an opportunity to submit a revised tender (Best and Final Offer (BAFO)) and again the Contracting Entity reserves the right to continue as set out in the 'Tender Stage' above. Those invited to negotiation will be provided with clear guidance on the structure / content to be discussed at the negotiation meetings.
 - The final tenders received will be evaluated on the basis of the same award criteria. However no further negotiation will take place, but the Contracting Entity reserves the right to engage in clarifications on minor aspects.
- It should be noted that the Contracting Entity reserves the right to award the contract directly following receipt of tenders at any stage without recourse to negotiations with individual tenderers.

3 About the Contract

The Contracting Entity aims to establish a Contract.

3.1 Scope of Requirements

3.1.1 Scope of the Contract

The Contracting Entity proposes to engage in a competitive process for the establishment of a contract for the provision of Defined Contribution (DC) Pension Plan services via a Master Trust arrangement.

The existing scheme was established in 2005 for all new employees joining the Company from that date. Governance is currently provided through a standalone Trust with independent professional trustees. Administration and investment options are managed by an insurance company. There are currently approximately 110 employees who are members of the Scheme, with combined annual contributions of approximately €2.5 million.

The Contracting Entities' main objectives in moving to a Master Trust are to achieve cost efficiency, improve member engagement and investment solutions.

Existing Pension Plan Details

- Number of members:
Active: 106
Deferred: 102
- Annual contributions:
Employer: €1.5 million
Employee: €1.0 million

Membership is compulsory to all new employees from their date of joining the Company.

Scope of Services

The successful Tenderer will be expected to deliver the following key services:

- **Investment Offering**
 - A diverse range of investment options aligned with members' risk profiles and retirement goals
 - Lifecycle or target-date funds
 - Access to ESG and responsible investment options
 - Regular review and enhancement of investment choices
 - Communication & Digital Support
- **Member engagement strategies and tools**
 - Digital platforms for account access, transactions, and information
 - Educational resources and retirement planning tools
 - Multichannel communication (email, app notifications, webinars)
 - Administration & Operations
- **Onboarding and ongoing member administration**
 - Contributions collection and processing
 - Record keeping and data management

- Compliance reporting and regulatory filings
- Member queries and support services
- Data analytics and insights
- **Fees & Cost Management**
 - Transparent fee structure
 - Cost optimisation strategies
 - Regular reporting on fees and charges
- **Exclusions**

Risk rebroking services are not in scope.

3.1.2 Intentionally deleted

3.2 Intentionally deleted

3.3 Intentionally deleted

3.4 Duration of the Contract

The construct of the contract will be for an initial period of five (5) years with 2 optional extensions, each of 5 years duration (5+5+5).

The maximum duration of the contract will be for 15 years subject to strategic alignment and review, satisfactory performance, business needs and budget constraints.

3.5 Estimated Value of the Contract

The estimated total value of purchases pursuant to the contract is in the region of €500,000 to €1million over the lifetime of the agreement.

It is emphasised, however, that these figures are provided strictly for indicative purposes only. there is no guaranteed expenditure under the framework agreement.

3.6 Intentionally deleted

3.7 Anticipated Timeline

The following indicative timeline is envisaged for this procurement:

Issue Qualification Questionnaire	As specified on title page
Closing Date for Queries (Qualification stage)	As specified on title page
Closing Date for Submission (Qualification stage)	As specified on title page
Anticipated date for Issue RFT	August 2026

The dates provided above are estimates at the time of publication of the Request for Tender. The Contracting Entity will endeavour to run the process to this timetable, but this cannot be guaranteed.

3.8 Intentionally deleted

3.9 Award to Runner up

If for any reason, it is not possible to award the contract to the designated successful tenderer emerging from this competitive process, or if having awarded the contract, the Contracting Entity considers that the successful tenderer has not met its constitutional obligations and cancels the contract, the Contracting Entity may at any time during the tender period and at its sole discretion, award the contract to the next highest tenderer under the terms and conditions advertised.

3.10 Intentionally deleted

4 Instructions to Candidates

Every effort has been made to ensure that this Document contains all the necessary information for the completion of applications. The Contracting Entity does not warrant or represent that this Document, or any other information given to Candidates, is accurate or complete. No liability is accepted for any error, misstatement, or omission (negligent or otherwise) in this Document, or in any other information given to Candidates.

4.1 Queries

The closing date for the queries are specified on the title page.

All queries regarding this competition should be through the messaging facility on www.etenders.gov.ie prior to the query deadline, including identification of any omissions which would prevent Candidates from submitting a comprehensive response. Please submit queries as soon as possible via eTenders to ensure maximum opportunity to receive answers and inform responses accordingly. Queries via any other means will not be responded to and the candidate will be re-directed to raise the query via eTenders.

In circulating responses, queries will be anonymised and will be published in the CfT Documents section. A message will be circulated to all parties who have expressed an interest in the procurement on the eTenders website to alert them of the posting of Clarifications. It is incumbent on Candidates to review these Documents as they will contain information relevant to the competition. Under the rules of procurement queries cannot generally be treated in confidence, however they will be anonymised prior to the circulation of any responses.

4.2 Submission of Applications

The Contracting Entity is using the dedicated submission facility on eTenders, and applications must be submitted electronically via www.etenders.gov.ie only. Only applications submitted in this manner will be accepted. Applications submitted by any other means (including but not limited to by the messaging facility on eTenders, email, post or hand delivery) will **not** be accepted.

Candidates must ensure that they give themselves enough time to upload and submit all required documentation before the closing date/time, noting that upload speeds may vary. Candidates must ensure they have submitted the response completely. It is advisable to familiarise yourself with the platform prior to the closing date.

Below we provide an overview of the key steps. Please note that the Contracting Entity take no responsibility for these steps being the totality of the steps required as different processes may require different actions.

For all up to date information on using eTenders, please refer to the Guidance Material on eTenders: <https://www.etenders.gov.ie/epps/home.do>

eTenders system usage queries are managed by eTenders Technical Support: <https://www.etenders.gov.ie/epps/PrepareContactUsAction.do>

If in doubt, please ensure you contact the eTenders helpdesk as follows:

Email: irish-eproc-helpdesk@eurodyn.com

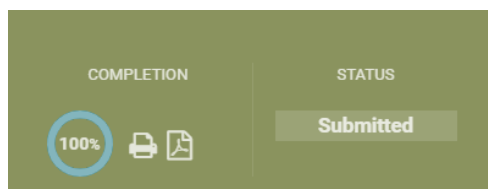
4.2.1 Accessing documents

It is important to note that you must ensure you **ASSOCIATE** your company with this competition in the first instance. To do this you must do the following:

- (a) Log-in to the system;
- (b) Locate the competition using the Advanced Search by Contracting Entity or Resource ID;
- (c) Click on the hyperlink for the competition which will bring you to the CfT Workspace;
- (d) In the “Show CfT” drop-down menu for the competition click on the “Expression of Interest”;
- (e) Complete the “Association with the CfT” tab;
- (f) This will then provide you with a link to the “Tender” tab under the “Show CfT” drop-down menu to enable you to upload your response.

4.2.2 Submitting your Response

In responding to a competition without an electronic ESPD, a number of steps are required. The final step involves clicking on a “Submit” button and receiving the following status:



If you do not receive a message similar to above and an email directly to the inbox of the person who submitted the response, **you have not formally submitted your application.**

Please note that the screen may say **OFFLINE**, this is a technical feature of eTenders and does not mean you cannot submit. Also please note you may see the percentage field also saying 100% before you submit, this still requires you to click the “Submit” button.

Please upload your response as a **ZIP FILE** to protect the integrity of the file names.

It is the responsibility of the Candidate to ensure that their application is complete and is uploaded in accordance with the instructions provided on eTenders prior to the deadline as per the front page.

4.3 Closing date for Applications

The closing date for the application is specified on the title page.

Candidates must ensure that they give themselves enough time to upload and submit all required documentation before the closing date/time. Candidates should consider the fact that upload speeds vary. For submissions, the Candidate can upload a total of 2.00 GB of files, with any individual file being up to 250MB. In order to submit a document to the electronic submission facility, please note that you must click “Submit Response” button. After submitting you can still modify and re-send your response up until the response deadline. Candidates should be aware that the “Submit Response” button will be disabled automatically upon the expiration of the response deadline.

It is the responsibility of the Candidate to ensure that their application is complete and is uploaded by the designated deadline. Applications that are received late or via other means **will not** be considered in this public procurement competition.

It is important to note that only persons who have downloaded and accepted a document can submit an upload.

4.4 Completing the Qualification Questionnaire

When completing the Qualification Questionnaire contained in *Part B* to this Document and published as a separate editable Document on eTenders, Candidates should note the following conditions.

All questions must be completed in full using the format provided.

All questions should be answered with relevance to the subject matter of this competition. For the avoidance of doubt, it is emphasised that the information requested in the Qualification Questionnaire is aimed solely at determining the suitability and choice of Candidates for entry to the competitive tendering stage.

Where a specific requirement is defined for a particular criterion Candidates must satisfy the requirements of that criterion in order to remain eligible for consideration in the competition.

Candidates are permitted to add lines to the pro-forma tables and boxes set out within the Qualification Questionnaire if required.

The Qualification Questionnaire must be completed in English.

All financial information should be denominated in euro (€), except where financial information is being provided in a certified or audited supporting document such as a set of financial statements in which case it is sufficient for the information to remain in its original currency.

Failure to provide a sufficient level of detail or to explain adequately any relevant matters may result in such data or information not being taken into account during the evaluation process.

The Contracting Entity is not responsible for and will not pay for any expense or cost incurred or loss suffered by a Candidate in the preparation or submission of its application or otherwise. Further, the Contracting Entity is not responsible for any travel or accommodation costs incurred by the Candidate unless previously agreed in writing by the Contracting Entity. Each Candidate is fully responsible for the entirety of all expenses and/or costs it incurs in the presentation or submission of an application or in participating in this process and competition.

4.5 Reliance on other Entities

Where a grouping (of economic operators¹) comes together, (regardless of the legal relationship between the various entities of that grouping) to submit an application in response to this Qualification Questionnaire, the Contracting Entity will deal with all matters relating to this Competition through the Prime Candidate only, who will carry overall responsibility for the performance of the contract if successful, irrespective of whether or not tasks are to be

¹ 'Economic operator' means any natural or legal person or public entity or group of such persons and/or entities, including any temporary association of undertakings, which offers the execution of works and/or a work, the supply of products or the provision of services on the market; (Art 2(6) of Directive 2014/25/EU).

performed by another entity within the grouping e.g., a subcontractor. The Candidate must clearly set out the name, title, telephone number, postal address, and email address of nominated contact personnel of the Prime Entity authorised to represent the Candidate and to whom all communications shall be directed and accepted until this Competition has been completed or terminated. Correspondence from any other person (including from any subcontractors) **will not** be accepted or responded to.

Candidates are reminded that they may rely on the resources of other entities in order to establish the suitability requirements on condition that they can prove to the satisfaction of the Contracting Entity that they will have these resources at their disposal when necessary.

All Prime Candidates relying on the capacity of other entities must:

- Identify in Section A of the Questionnaire as the Prime Candidate for the grouping, with whom the Contracting Entity will communicate and with whom any subsequent contractual arrangements will be made, if successful.
- Identify in Section A of the Questionnaire, the relevant entities upon whose capacity the Prime Candidate is relying upon to meet criteria and/or deliver elements of the contract.
- Ensure Section A of the Questionnaire (including all subsections) are completed and submitted for all relevant entities upon whom the Prime Candidate is relying on to meet criteria and/or deliver elements of the contract, if awarded.
- In all applications, the Prime Candidate must nominate the reference contracts for inclusion in the assessment and selection process. The number of reference contracts for which details are to be provided will be nominated in the relevant section of the Questionnaire of the Prime Candidate. If more reference contracts are provided than required only the first listed reference contracts to the number specified by the Contracting Entity (e.g. 3 reference contracts) will be considered. Where relying on the experience of other entities, at least one of the references provided should include reference to the relevant experience.
- Where a third party will indirectly provide particular resources /capacity such as licencing, hosting, etc. in the fulfilment of any future contract arising from the procurement process and these resources/capacities are generally available to all candidates on more or less the same terms, a completed Section A of the Questionnaire will not be required.
- The Contracting Entity reserves the right to seek additional information to verify the capacity of any party involved in the execution of the contract or being relied upon.

Subject to the above:

- The Contracting Entity may request proof that a Candidate who is relying on the capacities of other entities will have at its disposal the resources of the other entity, when necessary, this could include for example, a request for a written commitment of those entities.
- Where the Candidate is subsequently successful at tender stage, the Contracting Entity may require the members of the Candidate grouping to enter a formal legal arrangement for the contract as a single entity having joint and several liability and provide evidence of same.

4.6 European Single Procurement Document (ESPD)

In accordance with 2014 Directives, Candidates may have compiled a European Single Procurement Document (ESPD), which will be accepted as evidence of compliance with *Section A* of the Questionnaire. However, the Contracting Entity requires evidence via completed

submission of *Section B* relating to Technical Capacity. Mere affirmation **will not** be sufficient under these headings.

Progression to tender stage will be conditional upon identified Candidates providing evidence of self-declared information to the Contracting Entity. Failure to provide appropriate evidence within the required timeframe specified may result in the Candidate being deemed inadmissible for the next stage of the competition.

4.7 Evaluation of Applications

An “Application” comprises a completed Qualification Questionnaire including the associated appendices.

Applications will be evaluated strictly on their merits in accordance with the published selection criteria, minimum requirements and weightings as specified in the Qualification Questionnaire.

4.8 Clarification of Applications

While not being obliged to seek clarifications from Candidates, the Contracting Entity reserves the right, at its absolute discretion, to ask Candidates for clarification or elaboration of any aspect of their responses to assist in its evaluation of applications.

However, it is emphasised that the Contracting Entity will **not** be obliged to seek clarification where any of the essential pass requirements set out in the Qualification Questionnaire have not been met. Therefore, Candidates should pay particular attention to ensure that their applications contain all the required information.

4.9 Identification of Tender List

All applications will be evaluated in line with the criteria and requirements outlined in *Part B*. Responses will be scored, and it is anticipated that the five (5) highest-scoring Candidates (subject to sufficient qualifying submissions) will be invited to tender.

4.10 Freedom of Information Act

Candidates are advised that the Contracting Entity is not currently subject to the Freedom of Information (FOI) Act, 2014; however, it may in the future. If a Candidate considers that any of the information supplied in their response is either commercially sensitive or confidential in nature, this should be highlighted and the reasons for its sensitivity specified. In the event the Contracting Entity receives a Freedom of Information request relating to information identified as sensitive or confidential, the Contracting Entity will consult with the relevant Candidate before making a decision on disclosure. However, the final decision as to whether any information disclosed shall rest with the Contracting Entity in accordance with the FOI Act.

4.11 International Procurement Instrument

The Contracting Entity would refer Candidates in particular to the provisions of Regulation (EU) 2022/1031 on the access of third country economic operators, services and goods to the European Union’s public procurement and concession markets and procedures supporting negotiations on access of European Union economic operators, services and goods to the public procurement and concession markets of third countries and to their obligation to comply therewith.

In particular, Candidates should note in Article 6 of Regulation (EU) 2022/1031, the obligations for a Contracting Entity in the context of a procurement procedure where the EU Commission has adopted an International Procurement Instrument (IPI) measure.

4.12 Foreign Subsidies Regulation

Candidates are referred to the provisions of Regulation (EU) 2022/2560 of the European Parliament and of the Council on Foreign Subsidies distorting the Internal Market, in addition to Commission Implementing Regulation (EU) 2023/1441, and their obligation to comply therewith. In particular, Candidates should note the requirements in Articles 28 and 29 of Regulation (EU) 2022/2560 relating to the prior notification or declaration of foreign financial contributions, where the estimated value of the public procurement procedure is equal to or greater than the applicable financial thresholds set out therein.

4.13 Interference

Any effort by the Candidate to unduly influence the Contracting Entity, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of applications and in decisions concerning the award of the contract shall have their application rejected.

In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

4.14 Inducement to Purchase

The Contracting Entity shall be entitled to disqualify a Candidate in one of the following circumstances:

- (a) If the Candidate has offered or given or agreed to give to any person any gift or consideration of any kind as an inducement or reward for doing or forbearing to do, or for having done or forborne to do, any action in relation to the obtaining or execution of this contract award procedure or showing or forbearing to show favour or disfavour to any person in relation to this contract award procedure or any other contract award procedure with the Contracting Entity, or
- (b) If like acts have been done by any other person employed by the Candidate or acting on its behalf (whether with or without the knowledge of the Candidate).

4.15 Access to Information on the Environment

Candidates should be aware that, under the European Communities (Access to Information on the Environment) Regulations 2007 to 2014, information provided by them during this Competition may be liable to be disclosed.

Candidates are asked to consider if any of the information supplied by them in their response should not be disclosed because of its confidentiality or commercial sensitivity. If Candidates consider that certain information is not to be disclosed because of its confidentiality or commercial sensitivity, Candidates must, when providing such information, clearly identify such information and specify the reasons for its confidentiality or commercial sensitivity. If Candidates do not identify information as confidential or commercially sensitive, it is liable to be released in response to a request under the above legislation without further notice to or consultation with

the Candidate. The Contracting Entity will, where possible, consult with Candidates about confidential or commercially sensitive information so identified before making a decision on a request received.

The Contracting Entity is committed to the principles of environmental management in its activities, and it encourages the implementation of sustainability principles in its procurement practices and throughout the delivery of all contracts. Candidates should note that successful Candidates will be required to sign up to DPC's Supplier Code of Conduct as part of the RFT Stage.

4.16 Withholding Tax

Payments in relation to professional services shall be subject to Irish 'Professional Services Withholding Tax' (PSWT) at the prevailing rate (currently at 20%) as laid down by the revenue commissioners in Ireland. Non-residents may be able to reclaim such deducted tax from the Office of the Revenue Commissioners in Ireland, international claims section located currently at Government Buildings, Nenagh, Co. Tipperary, Ireland (Tel: +353-1-6733533).

4.17 Intentionally deleted

4.18 DPC Supplier Code of Conduct (SCoC)

DPC is committed to the principles of environmental management in its activities, and it encourages the implementation of sustainability principles in its procurement practices and throughout the delivery of all contracts. Candidates should note that successful Candidates will be required to sign up to DPC's Supplier Code of Conduct as part of the RFT Stage.

4.19 TUPE Information (Acquired Rights) (where applicable)

The successful Tenderer will be required to comply fully with the provisions of Council Directive 2001/23/EC on the approximation of laws of the Member States relating to the safeguarding of employees' rights in the event of transfers of undertakings, business or parts of undertakings or business, as implemented in Irish law by Statutory Instrument SI No. 131 of 2003 [European Communities (Protection of Employees on Transfers of Undertakings) Regulations 2003] (hereinafter referred to as 'the Regulations').

To this end, those who qualify for the tender stage will be required to confirm in writing their full and unreserved commitment to complying with their obligations at tender stage. At tender stage anonymised data will be provided to all tenderers on foot of a confidentiality / non-disclosure agreement being completed.

5 Questionnaire Summary

The table below is provided as a summary of the applicable selection criteria and the rules and assessment mechanism.

Where there is a discrepancy between this table and the contents of Part B – Questionnaire Response Document, this table would normally take precedence, however please contact the Contracting Entity as a matter of priority to seek a clarification.

PASS/FAIL CRITERIA		
Ref	Criteria	Pass Requirements
A1	General information	Candidates must complete this section. If the Candidate is a grouping, then a separate questionnaire must be completed for each group member.
A2	Tax Compliance	Candidates are required to complete the Self-Declaration Form relating to A2 to A4. Candidates should note that if invited to tender, they will be required to provide the evidence self-declared prior to receipt of Request for Tender.
A3	Financial Capacity	
A4	Insurance	
A5	Personnel and skills	Candidates must demonstrate that it has access to personnel with the requisite qualifications, skills and experience to deliver the services. Please note that multiple skills may reside in the same person. Candidates are also required to submit an organisational chart clearly identifying all relevant departments, divisions, and third parties, if applicable. • Pensions Governance Lead - minimum 10 years' relevant experience in occupational pension scheme governance and oversight. • Investment Specialist - demonstrable experience in DC pension investment strategies, including lifecycle/target-date funds. • Administration Operations Lead - experience managing pension scheme administration services, including contributions processing and member record management. • Client Relationship / Account Manager – responsible for service delivery, stakeholder engagement and performance management. • Compliance / Regulatory Specialist – experience in pensions regulatory compliance within the EU. Note: Candidates may satisfy the above requirement through personnel directly employed by the Candidate, personnel within their wider corporate group, or through third-party resources, provided that the Candidate can demonstrate that such resources will be available for the duration of the Contract.
A6	Data hosting, accessing and processing	Candidates must declare that data will be <u>hosted, accessed and processed</u> within the European Economic Area (EEA), or any country determined to offer an adequate level of data protection by an adequacy decision of the European Commission. Also, they must declare that data will be hosted in a data centre which will be ISO27001 accredited (or equivalent certification), with robust security measures and infrastructure complying with industry standards. Candidates must also demonstrate capability to access two data centres within the EEA/other country determined to offer an adequate level of data protection by an adequacy decision of the European Commission. Please provide details of two different hosting locations.

		Note: Where data will be hosted, accessed and processed outside the EEA, the Contracting Entity reserves the right to carry out further due diligence to ensure that the data of the Contracting Entity is appropriately protected.		
A7	Declaration of Bona Fides, Statutory Obligations, Art. 5K Regulation 2022/576/EU, and GDPR	Candidates must complete, sign and date these Declarations. The Contracting Entity reserves the right at its discretion to exclude a non-compliant Candidate under each heading. Note: Where a consortium is successful, at tender stage, each member of the consortium may be required to complete this Declaration of Bona Fides.		
A8	Regulatory Authorisation and Compliance	Candidates must demonstrate that it is authorised to provide pension administration and/or investment services within the EU and compliant with all relevant regulatory frameworks.		
WEIGHTED CRITERIA				
Ref	Criteria	Evaluation Requirements	Max marks	Min marks
B1	Previous Experience	Candidates must refer to instances within the last five (5) years which demonstrate that they have successfully delivered services of a comparable nature and scale on three (3) occasions. Candidates must specifically demonstrate: ➤ Experience in Master Trust pension provision. ➤ Experience with DC Pension Schemes of comparable size and complexity. ➤ Experience in transitioning DC Pension Schemes from traditional standalone trust arrangements to Master Trust structure. ➤ Overview of pension administration IT Systems/Platforms utilised. ➤ Capability to maintain member records. ➤ Governance structures for pension schemes / Master Trust arrangements.	7,500	3,750
B2	Quality Assurance Measures	Candidates must provide information on the measures, standards, policies and oversight in place to ensure the delivery of a quality service.	1,500	750

		Any Quality Management, Best Practice and Standards Adherence measures cited must be pertinent to the subject matter of this procurement process and relevant to the Candidate responding to this Qualification Questionnaire. Pertinent and relevant Quality Assurance processes certified (e.g. ISO standards) by an independent third party will generally score higher marks than in-house only systems.		
B3	Sustainability	Candidates must complete the Sustainability Questionnaire (Appendix XX)	1,000	500
Total			10,000	n/a

Candidates should note that they must achieve a minimum rating of 50% for each of the individual weighted criteria (B1) to (B3) in order to avoid elimination from the competition. Weighted criteria will be scored using the following baseline scoring system:

Score	Category	Description
90 – 100%	Exceptional	An exceptional response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80 – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – fully supported.
70 – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – strongly supported.
60 – 69%	Good	A good response demonstrating good understanding offering assurance to client – well supported.
50 – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client - satisfactorily supported.
<50%	Unacceptable	Less than 50% is unacceptable where there is a minimum score.
0%	No response	The Candidate failed to provide a response to the Criterion.

Marks in the score ranges outlined above can be awarded where responses so merit additional marks.

