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Tender

3960.PS.LWM.23 Investment Manager Services

University of Sheffield

F02: Contract notice

Notice identifier: 2024/S 000-000812

Procurement identifier (OCID): ocds-h6vhtk-042c0f

Published 10 January 2024, 2:24pm

Section I: Contracting authority

I.1) Name and addresses

University of Sheffield

Procurement Office, Arts Tower, Western Bank

Sheffield

S10 2TN

Email

l.w.marsden@sheffield.ac.uk

Country

United Kingdom

NUTS code

UKE32 - Sheffield

Internet address(es)

Main address

www.in-tendhost.co.uk/sheffield

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://in-tendhost.co.uk/Sheffield>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://in-tendhost.co.uk/Sheffield>

Tenders or requests to participate must be submitted to the above-mentioned address

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://in-tendhost.co.uk/Sheffield>

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Education

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

3960.PS.LWM.23 Investment Manager Services

Reference number

3960.PS.LWM.23

II.1.2) Main CPV code

- 66100000 - Banking and investment services

II.1.3) Type of contract

Services

II.1.4) Short description

The University of Sheffield invites tenders for the provision of investment management services. Tenders are invited for a contract to commence 1st September 2024 for an initial period of three years with the option to extend for a further two periods each of one year. The University is undertaking a review of its investment management service relating primarily to permanent and expendable endowed funds. Investments currently managed by the University's Investment Managers, are to be managed by the new Investment Manager service. The full technical specification can be found in the ITT documentation which will be available after you have expressed your interest on In-Tend.

II.1.5) Estimated total value

Value excluding VAT: £1,100,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description**II.2.2) Additional CPV code(s)**

- 66100000 - Banking and investment services
- 66120000 - Investment banking services and related services

II.2.3) Place of performance

NUTS codes

- UKE32 - Sheffield

II.2.4) Description of the procurement

The University of Sheffield invites tenders for the provision of investment management services. Tenders are invited for a contract to commence 1st September 2024 for an initial period of three years with the option to extend for a further two periods each of one

year. The University is undertaking a review of its investment management service relating primarily to permanent and expendable endowed funds. Investments currently managed by the University's Investment Managers, are to be managed by the new Investment Manager service. The full technical specification can be found in the ITT documentation which will be available after you have expressed your interest on In-Tend. Tender Process and Documentation: This is an FTS Restricted tender exercise. The ITT can be downloaded by registering and expressing your interest on the University's e-tendering system <https://in-tendhost.co.uk/Sheffieldlf> you have any questions or comments in relation to this tender, they must be submitted via the In-Tend System. Your tender response must also be submitted through In-Tend to arrive by the date and time specified. Late tenders will not be considered.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 75%

Price - Weighting: 25%

II.2.6) Estimated value

Value excluding VAT: £1,100,000

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

Duration in months

36

This contract is subject to renewal

No

II.2.10) Information about variants

Variants will be accepted: Yes

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

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Restricted procedure

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

12 February 2024

Local time

1:00pm

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: 3 (from the date stated for receipt of tender)

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.4) Procedures for review

VI.4.1) Review body

High Court of England, Wales and Northern Ireland

London

Country

United Kingdom