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Tender

Investment Management Service

NHS Tayside

F02: Contract notice

Notice identifier: 2022/S 000-002182

Procurement identifier (OCID): ocds-h6vhtk-030f1f

Published 25 January 2022, 3:15pm

Section I: Contracting authority

I.1) Name and addresses

NHS Tayside

Ninewells Hospital

Dundee

DD1 9SY

Contact

Carol Mackie

Email

carol.mackie@nhs.scot

Telephone

+44 1382660111

Fax

+44 1382496253

Country

United Kingdom

NUTS code

UKM - Scotland

Internet address(es)

Main address

<http://www.nhstayside.scot.nhs.uk>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00154

I.3) Communication

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

www.publictendersscotland.gov.uk

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

www.publictendersscotland.gov.uk

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Health

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Investment Management Service

Reference number

CON/020/21

II.1.2) Main CPV code

- 66150000 - Financial markets administration services

II.1.3) Type of contract

Services

II.1.4) Short description

Tayside NHS Board Endowment Fund T/A Tayside Health Fund (SCO11042) wishes to maximise returns on its invested capital, which is presently held as a range of assets amounting to c34mGBP (as at November 2021) in accordance with its Investment Strategy and is seeking tenders from suitably qualified investment management companies with a proven track record in the charity/environmental and social governance sector.

II.1.5) Estimated total value

Value excluding VAT: £450,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66150000 - Financial markets administration services
- 79412000 - Financial management consultancy services

II.2.3) Place of performance

NUTS codes

- UKM71 - Angus and Dundee City

Main site or place of performance

Ninewells Hospital, Dundee

II.2.4) Description of the procurement

Tayside NHS Board Endowment Fund T/A Tayside Health Fund (SCO11042) wishes to maximise returns on its invested capital, which is presently held as a range of assets amounting to c34mGBP (as at November 2021) in accordance with its Investment Strategy and is seeking tenders from suitably qualified investment management companies with a proven track record in the charity/environmental and social governance sector.

The contract will be awarded for an initial period of five (5) years with a possible option to extend for a further two (2) years

II.2.5) Award criteria

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

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

Possible two years (2) extension

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

Envisaged minimum number: 6

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

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

As detailed in the PQQ

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

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

2 March 2022

Local time

12:00pm

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

21 March 2022

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: No

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

VI.3) Additional information

All bidders should ensure they complete the SPD and the PQQ Questionnaire document which is located in the attachments area on PCS-T Portal

The buyer is using PCS-Tender to conduct this PQQ exercise. The Project code is 20560. For more information see:

<http://www.publiccontractscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

(SC Ref:680829)

VI.4) Procedures for review

VI.4.1) Review body

Dundee Sherriff Court

Dundee

Country

United Kingdom