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Tender

## **The Appointment of Treasury Advisors and Approved Fund Managers**

University of Huddersfield

F02: Contract notice

Notice identifier: 2023/S 000-002304

Procurement identifier (OCID): ocds-h6vhtk-039a89

Published 25 January 2023, 2:05pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

University of Huddersfield

UNIVERSITY OF HUDDERSFIELD QUEENSGATE, Queensgate

Huddersfield

HD1 3DH

#### **Contact**

Alex Carter

#### **Email**

[a.j.carter2@hud.ac.uk](mailto:a.j.carter2@hud.ac.uk)

#### **Telephone**

+44 1484256515

#### **Country**

United Kingdom

**Region code**

UK - United Kingdom

**Internet address(es)**

Main address

[www.hud.ac.uk](http://www.hud.ac.uk)

Buyer's address

[www.hud.ac.uk](http://www.hud.ac.uk)

**I.3) Communication**

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

<https://www.delta-esourcing.com/tenders/UK-UK-Huddersfield:-Financial-and-insurance-services./4XQ9A5N293>

Additional information can be obtained from the above-mentioned address

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://www.delta-esourcing.com/tenders/UK-title/4XQ9A5N293>

**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**

The Appointment of Treasury Advisors and Approved Fund Managers

Reference number

HUD-FIN-016

#### **II.1.2) Main CPV code**

- 66000000 - Financial and insurance services

#### **II.1.3) Type of contract**

Services

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

You are invited by the University of Huddersfield to submit a tender for the Appointment of Treasury Advisors and Approved Fund Managers.

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

Value excluding VAT: £10,000,000

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

This contract is divided into lots: No

### **II.2) Description**

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

- 66000000 - Financial and insurance services

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

NUTS codes

- UKE - Yorkshire and the Humber

Main site or place of performance

## YORKSHIRE AND THE HUMBER

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

You are invited by the University of Huddersfield to submit a tender for the Appointment of Treasury Advisors and Approved Fund Managers.

### **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**

Value excluding VAT: £10,000,000

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

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

The contract period for this agreement is 3 years, plus the option to extend it for a further 3 24-month periods, subject to continued demand, satisfactory performance, and pricing. Meaning the contract length is up to a maximum of 9 years.

### **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**

To respond to this opportunity please click here: <https://www.delta-sourcing.com/respond/4XQ9A5N293>

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## **Section III. Legal, economic, financial and technical information**

### **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

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

Accelerated procedure

Justification:

n/a

#### **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: [2023/S 000-000000](#)

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

Date

24 February 2023

Local time

12:00pm

### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

### **IV.2.7) Conditions for opening of tenders**

Date

24 February 2023

Local time

12:00pm

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.3) Additional information**

For more information about this opportunity, please visit the Delta eSourcing portal at:

<https://www.delta-esourcing.com/tenders/UK-UK-Huddersfield:-Financial-and-insurance-services./4XQ9A5N293>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/4XQ9A5N293>

GO Reference: GO-2023125-PRO-21979281

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

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

University of Huddersfield

Queensgate

Huddersfield

HD1 3DH

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[procurement@hud.ac.uk](mailto:procurement@hud.ac.uk)

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+44 1484471746

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