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Tender

AA-357-23 Investment Advisor for Endowment Fund

NHS Ayrshire & Arran

F02: Contract notice

Notice identifier: 2024/S 000-003490

Procurement identifier (OCID): ocds-h6vhtk-0436b2

Published 2 February 2024, 11:30am

Section I: Contracting authority

I.1) Name and addresses

NHS Ayrshire & Arran

Eglinton House, Ailsa Hospital, Dalmellington Road

Ayr

KA6 6AB

Email

procurement@south-ayrshire.scot.nhs.uk

Telephone

+44 1294323219

Country

United Kingdom

NUTS code

UKM94 - South Ayrshire

Internet address(es)

Main address

<http://www.nhsaaa.net>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00060

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

Access to the procurement documents is restricted. Further information can be obtained at

www.publiccontractsscotland.gov.uk

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

www.publiccontractsscotland.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

AA-357-23 Investment Advisor for Endowment Fund

Reference number

AA-357-23

II.1.2) Main CPV code

- 66120000 - Investment banking services and related services

II.1.3) Type of contract

Services

II.1.4) Short description

This tender is for the management of investments held by NHS Ayrshire & Arran (Scottish Registered Charity: SC007448)

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.3) Place of performance

NUTS codes

- UKM94 - South Ayrshire
- UKM93 - East Ayrshire and North Ayrshire mainland

II.2.4) Description of the procurement

This tender is for the management of investments held by NHS Ayrshire & Arran Endowment Fund (Scottish Registered Charity SC007448).

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70

Price - Weighting: 30

II.2.6) Estimated value

Value excluding VAT: £200,000

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

he contract will be for a period of three years with the option to extend up to 2 x 12 month periods.

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

Selection criteria as stated in the procurement documents

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.2.1) Information about a particular profession

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

Regulated in the UK by the Financial Conduct Authority (FCA).

III.2.2) Contract performance conditions

As stated in the Tender Documents.

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

Open 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

5 March 2024

Local time

12:00pm

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

Tender must be valid until: 5 June 2024

IV.2.7) Conditions for opening of tenders

Date

5 March 2024

Local time

12:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: The recurrent procurement will be advertised in 2029.

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.3) Additional information

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=756438.

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx.

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(SC Ref:756438)

Download the ESPD document here:

https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=756438

VI.4) Procedures for review

VI.4.1) Review body

Kilmarnock Sheriff Court

Sheriff Court House, St Marnock Street

Kilmarnock

KA1 1ED

Country

United Kingdom