

This is a published notice on the Find a Tender service: <https://www.find-tender.service.gov.uk/Notice/005292-2022>

Contract

## **Charitable Funds Investment Management Tender**

MSE Group

F03: Contract award notice

Notice identifier: 2022/S 000-005292

Procurement identifier (OCID): ocds-h6vhtk-02de4d

Published 25 February 2022, 12:45pm

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

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

MSE Group

Britannia House, Unit 12-14, Britannia Business Park

Southend

SS2 6GE

#### **Email**

[caron.robinson1@nhs.net](mailto:caron.robinson1@nhs.net)

#### **Telephone**

+44 1702508119

#### **Country**

United Kingdom

#### **NUTS code**

UKH3 - Essex

**Internet address(es)**

Main address

<http://www.successregimeessex.co.uk/>

Buyer's address

<http://www.successregimeessex.co.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**

Charitable Funds Investment Management Tender

Reference number

CA9203 - MSBP278

**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 Mid and South Essex NHS Foundation Trust Charity (Charity Commission Registration Number 1057266).

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

This contract is divided into lots: No

### **II.1.7) Total value of the procurement (excluding VAT)**

Value excluding VAT: £1,500,000

## **II.2) Description**

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

- 66122000 - Corporate finance and venture capital services
- 66140000 - Portfolio management services

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

NUTS codes

- UKH3 - Essex

Main site or place of performance

Essex

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

The Trustee of Mid and South Essex NHS Foundation Trust Charity wishes to re-tender the role of Investment Manager for the Charity's investment and all further information is contained in the tender documents.

### **II.2.5) Award criteria**

Cost criterion - Name: As per the ITT document / Weighting: 100.00%

### **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.2.1) Previous publication concerning this procedure**

Notice number: [2021/S 000-022238](#)

---

## **Section V. Award of contract**

### **Contract No**

CA9203

### **Title**

Charitable Funds Investment Management Tender

A contract/lot is awarded: Yes

### **V.2) Award of contract**

#### **V.2.1) Date of conclusion of the contract**

25 February 2022

#### **V.2.2) Information about tenders**

Number of tenders received: 7

The contract has been awarded to a group of economic operators: No

#### **V.2.3) Name and address of the contractor**

abrdrn

1 Bread Street,

London

EC4M 9HH

Email

[james.stevens@aberdeenstandard.com](mailto:james.stevens@aberdeenstandard.com)

Telephone

+44 7712486462

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.abrdrn.com](http://www.abrdrn.com)

The contractor is an SME

No

#### **V.2.4) Information on value of contract/lot (excluding VAT)**

Total value of the contract/lot: £1,500,000

---

## **Section VI. Complementary information**

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

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

Southend University Hospital NHS Foundation Trust

Britannia House, Unit 11-13, Britannia Business Park, Comet Way

Southend

SS2 6GE

Email

[contracts.purchasing@southend.nhs.uk](mailto:contracts.purchasing@southend.nhs.uk)

Telephone

+44 1702435555

Country

United Kingdom

Internet address

<http://www.southend.nhs.uk>

#### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

As per procurement documents