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Tender

## **Financial Advisor Services**

University of Bath

F02: Contract notice

Notice identifier: 2021/S 000-008671

Procurement identifier (OCID): ocds-h6vhtk-02a950

Published 22 April 2021, 6:25pm

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

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

University of Bath

Claverton Down

Bath

BA2 7AY

#### **Contact**

Greg Derrick

#### **Email**

[gd329@bath.ac.uk](mailto:gd329@bath.ac.uk)

#### **Telephone**

+44 1225387454

#### **Country**

United Kingdom

**NUTS code**

UKK - SOUTH WEST (ENGLAND)

**Internet address(es)**

Main address

[www.delta-esourcing.com](http://www.delta-esourcing.com)

**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-Bath:-Financial-consultancy-services./BU237449RP>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.delta-esourcing.com/tenders/UK-title/BU237449RP>

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

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Education

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**Section II: Object**

**II.1) Scope of the procurement**

**II.1.1) Title**

Financial Advisor Services

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

- 66171000 - Financial consultancy services

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

Services

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

The University of Bath is seeking an investment adviser.

The University wishes to ensure that its investment funds are managed effectively and efficiently in accordance with good industry practice, to deliver excellent return on investments.

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

Value excluding VAT: £50,000

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

This contract is divided into lots: No

## **II.2) Description**

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

NUTS codes

- UKK - SOUTH WEST (ENGLAND)

Main site or place of performance

SOUTH WEST (ENGLAND)

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

The University of Bath is seeking an investment adviser and you have been invited to tender for the role.

The University wishes to ensure that its investment funds are managed effectively and efficiently in accordance with good industry practice, to deliver excellent return on investments.

### **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: £50,000

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

Start date

22 June 2021

End date

30 April 2031

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

### **II.2.14) Additional information**

To respond to this opportunity please click here: <https://www.delta-sourcing.com/respond/BU237449RP>

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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

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## **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: No

### **IV.2) Administrative information**

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

Date

25 May 2021

Local time

2:00pm

#### **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)

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

Date

25 May 2021

Local time

2:00pm

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## **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

Electronic payment will be used

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

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

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

<https://www.delta-esourcing.com/tenders/UK-UK-Bath:-Financial-consultancy-services./BU237449RP>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/BU237449RP>

GO Reference: GO-2021422-PRO-18123527

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

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

University of Bath

Claverton Down

Bath

BA2 7AY

Country

United Kingdom