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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

Telephone

+44 1225387454

Country

United Kingdom

NUTS code

UKK - SOUTH WEST (ENGLAND)

Internet address(es)

Main address

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

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>

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

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

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>

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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