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Contract

## **QUB/2340/22 Independent Investment Advisory Service**

Queen's University Belfast

F03: Contract award notice

Notice identifier: 2023/S 000-008872

Procurement identifier (OCID): ocds-h6vhtk-038723

Published 27 March 2023, 4:46pm

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

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

Queen's University Belfast

Purchasing Office, University Road

Belfast

BT7 1NN

#### **Email**

[j.glackin@qub.ac.uk](mailto:j.glackin@qub.ac.uk)

#### **Telephone**

+44 2890973026

#### **Country**

United Kingdom

#### **NUTS code**

UKN06 - Belfast

**Internet address(es)**

Main address

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

Buyer's address

[www.qub.ac.uk/po](http://www.qub.ac.uk/po)

**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**

QUB/2340/22 Independent Investment Advisory Service

Reference number

QUB/2340/22

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

- 66100000 - Banking and investment services

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

Services

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

Queen's University Belfast is seeking tenders from competent and experienced Independent Investment Advisors to support the University and its Investment Committee in development of a holistic Investment Strategy in support of the delivery of Strategy 2030. Economic Operators must be authorised to provide investment advisory services within Northern Ireland and demonstrate that they can provide such services in accordance with the relevant professional standards.

#### **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: £600,000

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

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

- 66100000 - Banking and investment services

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

NUTS codes

- UKN06 - Belfast

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

The University is seeking tenders from competent and experienced Independent Investment Advisors to support the University and its Investment Committee in development of a holistic Investment Strategy in support of the delivery of Strategy 2030. Economic Operators must be authorised to provide investment advisory services within Northern Ireland and demonstrate that they can provide such services in accordance with the relevant professional standards. The contract will be for an initial period of 4 years with options to extend by up to a further 36 months.

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

Quality criterion - Name: Technical / Weighting: 70

Price - Weighting: 30

#### **II.2.11) Information about options**

Options: Yes

Description of options

The contract is for a period of 4 years with options to extend by up to a further 36 months.

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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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: Yes

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

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

Notice number: [2022/S 000-033019](#)

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

### **Contract No**

QUB/2340/22

### **Title**

Independent Investment Advisory Service

A contract/lot is awarded: Yes

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

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

27 March 2023

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

Number of tenders received: 4

Number of tenders received from SMEs: 1

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 0

Number of tenders received by electronic means: 4

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

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

Lane Clark & Peacock LLP

95 Wigmore Street

London

W1U 1DQ

Telephone

+44 1962872718

Country

United Kingdom

NUTS code

- UKI - London

Internet address

<https://www.lcp.uk.com/>

The contractor is an SME

No

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

Initial estimated total value of the contract/lot: £600,000

Total value of the contract/lot: £600,000

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## **Section VI. Complementary information**

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

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

Queen's University Belfast

Belfast

Country

United Kingdom