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Contract

## **Investment Manager Services**

University of York

F03: Contract award notice

Notice identifier: 2023/S 000-015314

Procurement identifier (OCID): ocds-h6vhtk-031a6c

Published 30 May 2023, 6:25pm

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

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

University of York

Heslington

York

YO10 5DD

#### **Contact**

Procurement Office

#### **Email**

[donna.lyon@york.ac.uk](mailto:donna.lyon@york.ac.uk)

#### **Telephone**

+44 1904328207

#### **Country**

United Kingdom

**NUTS code**

UKE21 - York

**Internet address(es)**

Main address

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

**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**

Investment Manager Services

Reference number

UY/PROC/844

**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**

The University of York is pleased to invite tenders from FCA authorised firms for the provision of discretionary investment management services for an initial contract term of 5

years. The University's investment portfolio currently contains permanent endowment assets valued at approximately £7.3m. The services we require as a minimum are: - Suitable investment strategy and allocation advice- Portfolio management and reporting- Account management and market insightFurther details can be found in the invitation to tender documents.

#### **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: £206,966

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

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

- 66120000 - Investment banking services and related services

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

NUTS codes

- UKE21 - York

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

As stated in II.1.4

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

Quality criterion - Name: Quality criterion - Name: Quality criteria with sub-criteria as set out in the ITT documents / Weighting: 75

Price - Weighting: 25

#### **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

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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 000-005072](#)

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

### **Contract No**

UY/PROC/844

### **Title**

Investment Manager Services

A contract/lot is awarded: Yes

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

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

14 November 2022

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

Number of tenders received: 15

Number of tenders received from SMEs: 3

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

Number of tenders received from tenderers from non-EU Member States: 15

Number of tenders received by electronic means: 15

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

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

abrdrn Capital Limited

London

Country

United Kingdom

NUTS code

- UKI - London

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: £200,000

Total value of the contract/lot: £206,966

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## **Section VI. Complementary information**

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

Please note that the values published are the anticipated spend for the 5 year initial term of the contract. The University reserves the right to extend for a further 1+1 years.

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

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

University of York

York

Country

United Kingdom