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Tender

## **Dyfed Pension Fund Independent Investment Adviser**

Carmarthenshire County Council

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-015454

Procurement identifier (OCID): ocds-h6vhtk-04efbb ([view related notices](#))

Published 16 April 2025, 10:46am

### **Scope**

### **Description**

Carmarthenshire County Council wish to appoint a suitably qualified Adviser to provide independent investment specialist advice to help the Dyfed Pension Fund achieve its goals.

### **Total value (estimated)**

- £150,000 excluding VAT
- £179,999 including VAT

Below the relevant threshold

### **Contract dates (estimated)**

- 1 October 2025 to 30 September 2028

- Possible extension to 30 September 2030
- 5 years

Description of possible extension:

There is an option to extend by up to 24 months

## **Main procurement category**

Services

## **CPV classifications**

- 66000000 - Financial and insurance services

## **Contract locations**

- UKL14 - South West Wales

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## **Participation**

### **Conditions of participation**

As per tender documentation

### **Particular suitability**

Small and medium-sized enterprises (SME)

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## **Submission**

### **Enquiry deadline**

12 May 2025, 2:00pm

### **Tender submission deadline**

16 May 2025, 2:00pm

### **Submission address and any special instructions**

To assist you in locating these opportunities on the BRAVO E Procurement System the project code is: project\_58825

As this is an Open procedure, Tenderers must ensure that all ITT questions are fully responded to. The following ITT Project codes may further assist you in locating the opportunities:

ITT Code: itt\_116149

Please also ensure you check the Attachments area for any documents/ information which may assist you with your submission or you are required to upload as part of your submission as per information contained within the tender pack.

Suppliers Instructions How to express interest in this Tender:

1. Register your company on the etenderwales portal (this is only required once)

- Browse to the eSourcing Portal: [www.etenderwales.bravosolution.co.uk](http://www.etenderwales.bravosolution.co.uk)

- Click the "Suppliers register here" link

- Enter your correct business and user details

- Note the username you chose and click "Save" when complete
- You will shortly receive an email with your unique password (please keep this secure)
- Agree to the terms and conditions and click "continue"

## 2. Express an Interest in the Project

- Login to the portal with the username/password
- Click the "ITTs Open to All Suppliers" link. (These are Invitation to Tender Documents open to any registered supplier)
- Click on the relevant ITT to access the content.
- Click the "Express Interest" button at the top of the screen
- This will move the ITT into your "My ITTs" page. (This is a secure area reserved for your projects only)
- Click on the ITT code, you can now access any attachments by clicking the ""Buyer Attachments" on the left hand side of the screen

## 3. Responding to the tender

- At the top of the screen you can choose to Create Response or Decline to Respond (please give a reason if declining)
- You can now use the Messages function on to communicate with the buyer and seek any clarification
- Note the deadline for completion, then follow the onscreen instructions to complete the ITT
- There may be a mixture of online & offline actions for you to perform (there is detailed online help available)

If you require any further assistance use the online help, or the BravoSolution help desk is available Mon - Fri (8am - 6pm) on:

- email: [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)
- Phone: 0800 368 4850/ Fax: 020 7080 0480

Tenders or Requests to Participate must be sent to:

Official name:

[www.etenderwales.bravosolution.co.uk](http://www.etenderwales.bravosolution.co.uk)

Postal Address:

Carmarthenshire County Council will be conducting this procurement exercise through the Value Wales e-Tendering portal. This can be found at

[www.etenderwales.bravosolution.co.uk](http://www.etenderwales.bravosolution.co.uk), all information may be downloaded and returned through this channel.

## **Tenders may be submitted electronically**

Yes

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## **Award criteria**

<b>Name</b>	<b>Description</b>	<b>Type</b>
Technical	70% Quality	Quality
Commercial	30% Cost	Cost

## **Weighting description**

Quality/Cost

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## **Procedure**

### **Procedure type**

Below threshold - open competition

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## Contracting authority

### Carmarthenshire County Council

- Public Procurement Organisation Number: PTVL-7854-TMRZ

County Hall

Carmarthen

SA31 1JH

United Kingdom

Contact name: Hayley Davies

Email: [HaLDavies@carmarthenshire.gov.uk](mailto:HaLDavies@carmarthenshire.gov.uk)

Website: <https://www.carmarthenshire.gov.uk>

Region: UKL14 - South West Wales

Organisation type: Public authority - sub-central government

Devolved regulations that apply: Wales