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Tender

Investment Advisory Services

Aberystwyth University

F02: Contract notice

Notice identifier: 2022/S 000-019254

Procurement identifier (OCID): ocds-h6vhtk-0351de

Published 14 July 2022, 11:11am

Section I: Contracting authority

I.1) Name and addresses

Aberystwyth University

c/o Finance Office, Student Welcome Centre, Penglais Campus

Aberystwyth

SY23 3FB

Email

pad47@aber.ac.uk

Telephone

+44 1970628716

Country

United Kingdom

NUTS code

UKL1 - West Wales and the Valleys

Internet address(es)

Main address

<https://www.aber.ac.uk/>

Buyer's address

https://www.sell2wales.gov.wales/search/Search_AuthProfile.aspx?ID=AA1009

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://etenderwales.bravosolution.co.uk/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://etenderwales.bravosolution.co.uk/>

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://etenderwales.bravosolution.co.uk/>

I.4) Type of the contracting authority

Other type

University

I.5) Main activity

Education

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Investment Advisory Services

II.1.2) Main CPV code

- 66100000 - Banking and investment services

II.1.3) Type of contract

Services

II.1.4) Short description

The University seeks to engage a professional Investment advisor to assist the Investments Committee and staff in undertaking the duties delegated to it as outlined in its Terms of Reference for a 48 month period .

Aberystwyth University currently has 159 Endowment Funds with a capital value of 40.4m. New funds are created almost annually whilst some of the original funds date back to the very inception of the University. The Endowment funds have primarily been created via a mixture of donations and bequests with the vast majority having specific conditions attached to their use.

Revenue is currently used for a variety of purposes such as Scholarships, Bursaries, and Prizes for students, as well as assisting staff with their work and research through grants and awards. Over the years the Endowment Funds have also contributed towards other institutional goals such as the purchase of land, buildings, and equipment.

II.1.5) Estimated total value

Value excluding VAT: £450,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66170000 - Financial consultancy, financial transaction processing and clearing-house services

II.2.3) Place of performance

NUTS codes

- UKL1 - West Wales and the Valleys

Main site or place of performance

Aberystwyth University

II.2.4) Description of the procurement

Aberystwyth University is seek to appoint investment advisory services for a period of 48 months.

II.2.5) Award criteria

Quality criterion - Name: Technical / Weighting: 70

Cost criterion - Name: Cost / Weighting: 30

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

Start date

1 February 2023

End date

1 February 2027

This contract is subject to renewal

No

II.2.10) Information about variants

Variants will be accepted: No

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

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

Please see technical envelope

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

III.2) Conditions related to the contract

III.2.3) Information about staff responsible for the performance of the contract

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

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: [2016/S 190-340856](#)

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

Date

15 August 2022

Local time

2:00pm

IV.2.4) Languages in which tenders or requests to participate may be submitted

English, Welsh

IV.2.7) Conditions for opening of tenders

Date

15 August 2022

Local time

2:00pm

Place

E-tender Wales

Information about authorised persons and opening procedure

Opening Committee enabled on E-tender system

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

NOTE: The authority is using eTenderwales to carry out this procurement process. To obtain further information record your interest on Sell2Wales at

https://www.sell2wales.gov.wales/search/search_switch.aspx?ID=123126

(WA Ref:123126)

The buyer considers that this contract is suitable for consortia.

VI.4) Procedures for review

VI.4.1) Review body

High Court

Royal Courts of Justice, The Strand

London

WC2A 2LL

Telephone

+44 2079477501

Country

United Kingdom