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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](mailto: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](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

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## **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

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## **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

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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: [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

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## **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](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