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Contract

## **Financial Advisor Services**

University of Bath

F03: Contract award notice

Notice identifier: 2021/S 000-023927

Procurement identifier (OCID): ocds-h6vhtk-02e4e7

Published 27 September 2021, 12:15pm

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

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

University of Bath

Claverton Down

Bath

BA2 7AY

#### **Contact**

Greg Derrick

#### **Email**

[gd329@bath.ac.uk](mailto:gd329@bath.ac.uk)

#### **Telephone**

+44 1225387454

#### **Country**

United Kingdom

**NUTS code**

UKK - South West (England)

**Internet address(es)**

Main address

<http://www.delta-esourcing.com>

**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**

Financial Advisor Services

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

- 66171000 - Financial consultancy services

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

Services

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

The University of Bath is seeking an investment adviser.

The University wishes to ensure that its investment funds are managed effectively and efficiently in accordance with good industry practice, to deliver excellent return on investments.

#### **II.1.6) Information about lots**

This contract is divided into lots: No

#### **II.1.7) Total value of the procurement (excluding VAT)**

Lowest offer: £40,000 / Highest offer: £328,000 taken into consideration

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

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

NUTS codes

- UKK - South West (England)

Main site or place of performance

SOUTH WEST (ENGLAND)

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

The University of Bath is seeking an investment adviser and you have been invited to tender for the role.

The University wishes to ensure that its investment funds are managed effectively and efficiently in accordance with good industry practice, to deliver excellent return on investments.

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

Quality criterion - Name: Experience / Weighting: 20

Quality criterion - Name: Service Quality / Weighting: 15

Quality criterion - Name: Service Delivery / Weighting: 50

Cost criterion - Name: Price / Weighting: 15

#### **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

#### **II.2.14) Additional information**

To respond to this opportunity please click here: <https://www.delta-sourcing.com/respond/BU237449RP>

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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: No

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

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

Notice number: [2021/S 222-333333](#)

#### **IV.2.9) Information about termination of call for competition in the form of a prior information notice**

The contracting authority will not award any further contracts based on the above prior information notice

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

A contract/lot is awarded: Yes

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

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

23 July 2021

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

Number of tenders received: 8

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

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

Mercer Limited

1 TOWER PLACE WEST, TOWER PLACE

LONDON

EC3R 5BU

Country

United Kingdom

NUTS code

- UKI - London

National registration number

00984275

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: £40,000

Total value of the contract/lot: £400,000

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## **Section VI. Complementary information**

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

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=628516212>

GO Reference: GO-2021927-PRO-18975498

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

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

University of Bath

Claverton Down

Bath

BA2 7AY

Country

United Kingdom