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Awarded contract

Financial Advisor Services

University of Bath

F03: Contract award notice

Notice reference: 2021/S 000-023927

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

Telephone

+44 1225387454

Country

United Kingdom

NUTS code

UKK - South West (England)

Internet address(es)

Main address

www.delta-esourcing.com

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Education

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>

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

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

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