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Planning

Investment Manager

Abertay University

F01: Prior information notice

Reducing time limits for receipt of tenders

Notice identifier: 2021/S 000-024389

Procurement identifier (OCID): ocds-h6vhtk-02e6b4

Published 1 October 2021, 8:55am

Section I: Contracting authority

I.1) Name and addresses

Abertay University

Bell Street

Dundee

DD1 1HG

Email

procurement@abertay.ac.uk

Telephone

+44 1382308995

Country

United Kingdom

NUTS code

UK - United Kingdom

Internet address(es)

Main address

<http://www.abertay.ac.uk>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00103

I.3) Communication

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/>

I.4) Type of the contracting authority

Other type

Higher Education

I.5) Main activity

Education

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Investment Manager

Reference number

AU-PRO-2021-060

II.1.2) Main CPV code

- 66100000 - Banking and investment services

II.1.3) Type of contract

Services

II.1.4) Short description

Abertay University is looking for the services of an Investment Manager to manage the long term investment of its assets portfolio.

II.1.5) Estimated total value

Value excluding VAT: £180,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66100000 - Banking and investment services
- 66120000 - Investment banking services and related services

II.2.3) Place of performance

NUTS codes

- UKM71 - Angus and Dundee City

Main site or place of performance

Dundee

II.2.4) Description of the procurement

The University requires an Investment Manager to manage its asset portfolio. The Investment Manager must take into account environmental, social, and governance factors when considering any investment. It is also expected that the Investment Manager is a signatory to the UN Principles for Responsible Investment (UNPRI) and the UK Stewardship Code in this regard. Responsible Investment is a key requirement of this provision.

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

Start date

8 March 2022

End date

1 April 2025

This contract is subject to renewal

Yes

Description of renewals

An option to extend will be available for a period(s) of up to 36 months.

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.3) Estimated date of publication of contract notice

15 November 2021

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

Investment Manager is a signatory to the UN Principles for Responsible Investment (UNPRI) and the UK Stewardship Code

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.2.2) Contract performance conditions

the University has a number of investment restrictions in place, including:

No direct investment in companies involved in tobacco production

No direct investment in alcohol producers

No direct investment in companies involved in the production of weapons

No investment in companies known to be involved in any offences as stated within the Modern Slavery Act 2015

The Investment Manager is responsible for ensuring no investments are made with companies involved in the above restricted activities where it can be identified, with their relevant supply chains.

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.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.5) Scheduled date for start of award procedures

9 December 2021

Section VI. Complementary information

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: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=668875.

(SC Ref:668875)

VI.4) Procedures for review

VI.4.1) Review body

Dundee Sheriff Court

6 W Bell St

Dundee

DD1 9AD

Country

United Kingdom