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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](mailto: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](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

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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

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

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## **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](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