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Planning

HH052-23-HB Investment Manager/Advisor Services – Endowment Fund

NHS Highland
NHS Orkney

F01: Prior information notice

Prior information only

Notice identifier: 2023/S 000-028187

Procurement identifier (OCID): ocids-h6vhtk-04035a

Published 25 September 2023, 12:41pm

Section I: Contracting authority

I.1) Name and addresses

NHS Highland

Assynt House, Beechwood Park

Inverness

IV2 3BW

Email

nhsh.tenders@nhs.scot

Telephone

+44 7929069647

Country

United Kingdom

NUTS code

UKM6 - Highlands and Islands

Internet address(es)

Main address

<http://www.nhshighland.scot.nhs.uk>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00302

I.1) Name and addresses

NHS Orkney

The Balfour, New Foreland Road

Kirkwall

KW15 1NZ

Email

ork-hb.feedback@nhs.net

Telephone

+44 1856888226

Country

United Kingdom

NUTS code

UKM65 - Orkney Islands

Internet address(es)

Main address

<http://www.ohb.scot.nhs.uk>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00368

I.2) Information about joint procurement

The contract involves joint procurement

I.3) Communication

Additional information can be obtained from the above-mentioned address

I.4) Type of the contracting authority

Ministry or any other national or federal authority

I.5) Main activity

Health

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

HH052-23-HB Investment Manager/Advisor Services – Endowment Fund

Reference number

HH052-23-HB

II.1.2) Main CPV code

- 66120000 - Investment banking services and related services

II.1.3) Type of contract

Services

II.1.4) Short description

Prior Information Notice to provide advance notification of potential forthcoming contract opportunities to provide NHS Highland and NHS Orkney with Investment Manager/Advisor Services for their Endowment Funds.

II.1.5) Estimated total value

Value excluding VAT: £188,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66120000 - Investment banking services and related services

II.2.3) Place of performance

NUTS codes

- UKM6 - Highlands and Islands

II.2.4) Description of the procurement

It is anticipated that the scope of the services covered under the contract will include,

- The provision of an Endowments Funds Investment Services for NHS Highland and NHS Orkney.
- The provider shall make recommendations to the Endowment Fund Committees in relation to the most appropriate investment policies in order to achieve the Endowment Fund objectives.
- The Provider shall take into account environmental, social, and governance factors into consideration when considering any investment within the Endowment Fund portfolios.
- It is also expected that the Investment Manager/Advisor is a signatory to the UN Principles for Responsible Investment (UNPRI) and the UK Stewardship Code in this regard.
- The Health Boards require a single Investment Manager/Advisor to implement the entire mandate.

II.2.14) Additional information

Please note, the information contained within this Prior Information Notice (PIN) is subject to change.

II.3) Estimated date of publication of contract notice

13 November 2023

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

Section VI. Complementary information

VI.3) Additional information

NHS Highland and NHS Orkney are undertaking a market scoping exercise to explore if there are enough potential providers with sufficient capacity to meet the requirements set out in this notice. If you are suitably experienced and competent in meeting the requirements, then please note your interest. In doing this it will help with determining the Health Board's route to market for their requirements.

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=745288.

(SC Ref:745288)