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Contract

## **Investment Advisory Services**

Aberystwyth University

F03: Contract award notice

Notice identifier: 2022/S 000-029882

Procurement identifier (OCID): ocds-h6vhtk-03783c

Published 24 October 2022, 11:12am

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

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

Aberystwyth University

c/o Finance Office, Student Welcome Centre, Penglais Campus

Aberystwyth

SY23 3FB

#### **Email**

[pad47@aber.ac.uk](mailto:pad47@aber.ac.uk)

#### **Telephone**

+44 1970628716

#### **Country**

United Kingdom

#### **NUTS code**

UKL1 - West Wales and the Valleys

**Internet address(es)**

Main address

<https://www.aber.ac.uk/>

Buyer's address

[https://www.sell2wales.gov.wales/search/Search\\_AuthProfile.aspx?ID=AA1009](https://www.sell2wales.gov.wales/search/Search_AuthProfile.aspx?ID=AA1009)

**I.2) Information about joint procurement**

The contract is awarded by a central purchasing body

**I.4) Type of the contracting authority**

Other type

University

**I.5) Main activity**

Education

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Investment Advisory Services

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

- 66100000 - Banking and investment services

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

Services

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

The University seeks to engage a professional Investment advisor to assist the Investments Committee and staff in undertaking the duties delegated to it as outlined in its Terms of Reference for a 48 month period .

Aberystwyth University currently has 159 Endowment Funds with a capital value of 40.4m. New funds are created almost annually whilst some of the original funds date back to the very inception of the University. The Endowment funds have primarily been created via a mixture of donations and bequests with the vast majority having specific conditions attached to their use.

Revenue is currently used for a variety of purposes such as Scholarships, Bursaries, and Prizes for students, as well as assisting staff with their work and research through grants and awards. Over the years the Endowment Funds have also contributed towards other institutional goals such as the purchase of land, buildings, and equipment.

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

This contract is divided into lots: No

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

Value excluding VAT: £400,000

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

#### **II.2.2) Additional CPV code(s)**

- 66170000 - Financial consultancy, financial transaction processing and clearing-house services

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

NUTS codes

- UKL1 - West Wales and the Valleys

Main site or place of performance

Aberystwyth University

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

Aberystwyth University is seek to appoint investment advisory services for a period of 48 months.

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

Quality criterion - Name: Technical / Weighting: 70

Cost criterion - Name: Cost / Weighting: 30

### **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

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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: Yes

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

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

Notice number: [2022/S 022-123126](#)

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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**

21 October 2022

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

Number of tenders received: 7

Number of tenders received from SMEs: 0

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 0

Number of tenders received by electronic means: 7

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

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

Quantum Advisory

Cypress House, Pascal Close

Cardiff

CF30LW

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

No

**V.2.4) Information on value of contract/lot (excluding VAT)**

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

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## **Section VI. Complementary information**

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

(WA Ref:125861)

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

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

High Court

Royal Courts of Justice, The Strand

London

WC2A 2LL

Telephone

+44 2079477501

Country

United Kingdom