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Tender

## **QUB/2340/22 Independent Investment Advisory Service**

Queen's University Belfast

F02: Contract notice

Notice identifier: 2022/S 000-033019

Procurement identifier (OCID): ocds-h6vhtk-038723

Published 21 November 2022, 6:02pm

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

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

Queen's University Belfast

Purchasing Office, University Road

Belfast

BT7 1NN

#### **Email**

[j.glackin@qub.ac.uk](mailto:j.glackin@qub.ac.uk)

#### **Telephone**

+44 2890973026

#### **Country**

United Kingdom

#### **NUTS code**

UKN06 - Belfast

**Internet address(es)**

Main address

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

Buyer's address

<http://www.qub.ac.uk/po>

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.in-tendhost.com/queensuniversitybelfast.aspx/Home>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted to the above-mentioned address

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://www.in-tendhost.com/queensuniversitybelfast.aspx/Home>

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

Body governed by public law

**I.5) Main activity**

Education

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**Section II: Object**

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

**II.1.1) Title**

## QUB/2340/22 Independent Investment Advisory Service

Reference number

QUB/2340/22

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

- 66100000 - Banking and investment services

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

Services

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

Queen's University Belfast is seeking tenders from competent and experienced Independent Investment Advisors to support the University and its Investment Committee in development of a holistic Investment Strategy in support of the delivery of Strategy 2030. Economic Operators must be authorised to provide investment advisory services within Northern Ireland and demonstrate that they can provide such services in accordance with the relevant professional standards.

### **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

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

NUTS codes

- UKN06 - Belfast

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

The University is seeking tenders from competent and experienced Independent Investment Advisors to support the University and its Investment Committee in development of a holistic Investment Strategy in support of the delivery of Strategy 2030. Economic Operators must be authorised to provide investment advisory services within Northern Ireland and demonstrate that they can provide such services in accordance with

the relevant professional standards. The contract will be for an initial period of 4 years with options to extend by up to a further 36 months.

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

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

The contract may be subject to renewal subject to satisfactory performance during the initial 4 year period plus any options to extend that may be exercised

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

The contract is for a period of 4 years with options to extend by up to a further 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

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **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.2.3) 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

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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.2.2) Time limit for receipt of tenders or requests to participate**

Date

21 December 2022

Local time

4:00pm

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.7) Conditions for opening of tenders**

Date

21 December 2022

Local time

4:30pm

Place

Queen's University Belfast

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: 66 months

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

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

Queen's University Belfast

Belfast

Country

United Kingdom