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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

Telephone

+44 2890973026

Country

United Kingdom

NUTS code

UKN06 - Belfast

Internet address(es)

Main address

www.qub.ac.uk

Buyer's address

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

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

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

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

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