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Tender

Treasury and Capital Markets Advisory Services 2025

The Wheatley Housing Group Limited

F02: Contract notice

Notice identifier: 2025/S 000-036847

Procurement identifier (OCID): ocds-h6vhtk-0557ae

Published 2 July 2025, 2:59pm

Section I: Contracting authority

I.1) Name and addresses

The Wheatley Housing Group Limited

25 Cochrane Street

Glasgow

G1 1HL

Email

neve.beaton@wheatley-group.com

Telephone

+44 8004797979

Country

United Kingdom

NUTS code

UKM82 - Glasgow City

Internet address(es)

Main address

<http://www.wheatley-group.com>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA10306

I.3) Communication

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

www.publiccontractsscotland.gov.uk

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

www.publiccontractsscotland.gov.uk

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Housing and community amenities

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Treasury and Capital Markets Advisory Services 2025

Reference number

FI0005

II.1.2) Main CPV code

- 66122000 - Corporate finance and venture capital services

II.1.3) Type of contract

Services

II.1.4) Short description

To identify suitably qualified and experienced treasury and capital market advisors to support the Wheatley Group with commercial, technical and investor relations advice alongside our legal and banking partners.

II.1.5) Estimated total value

Value excluding VAT: £130,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66122000 - Corporate finance and venture capital services
- 66600000 - Treasury services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

Main site or place of performance

Edinburgh, Lothian, Livingston and Whitburn geographical areas of Scotland

II.2.4) Description of the procurement

To identify suitably qualified and experienced treasury and capital market advisors to support the Wheatley Group with commercial, technical and investor relations advice

alongside our legal and banking partners.

II.2.5) Award criteria

Quality criterion - Name: Quality criterion / Weighting: 70

Quality criterion - Name: Price Criterion / Weighting: 30

Price - Weighting: 30

II.2.6) Estimated value

Value excluding VAT: £130,000

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

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

Option to extend for a further 2 years at Wheatley's discretion. (2+2 year term)

II.2.10) Information about variants

Variants will be accepted: No

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

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

N/A

III.1.2) Economic and financial standing

List and brief description of selection criteria

Credit Check - Equifax or any other credit rating platform

Insurance Levels

Minimum level(s) of standards possibly required

EQUIFAX

Tenderers must provide current Equifax rating.

It is preferential that tenderers have a current Equifax (or equal) financial report score of D or better.

The Wheatley Group will utilise Equifax to assist in its determination of the organisation's financial status and risk. It is recommended that Tenderers review their own Equifax Score in advance of submitting their Tender submission. If, following this review, Tenderers consider that the Equifax Score does not reflect their current financial status, the Bidder should attach a document to their tender submission, clearly referenced, giving a detailed explanation, together with any relevant supporting independent evidence. The Wheatley Group will review any such information as part of the evaluation of Tenderers financial status.

Organisations that do not have a subscription account with Equifax will not have access to their Equifax grade at the time of tender submission. Therefore, these bidders can respond by providing details of their credit rating from any platform they have access to.

INSURANCE

Tenderers must confirm:

The under-noted insurance provision being in place or provide confirmation that in the event of success in the tender process, the under-noted insurance provision will be put in place:

Employers Liability to a minimum indemnity of GBP5,000,000

Public Liability to a minimum indemnity of GBP5,000,000

Professional Indemnity insurance to a minimum indemnity of GBP5,000,000 in the aggregate

Where a Tenderer does not hold or commit to obtaining the types and levels of insurance indicated, the Wheatley Group will exclude the Tender from the competition.

III.1.3) Technical and professional ability

List and brief description of selection criteria

N/A

III.2) Conditions related to the contract

III.2.2) Contract performance conditions

Tenderers must :

Complete the SPD Document;

Accept the Terms and Conditions of the Invitation to Tender ITT;

Accept the Terms and Conditions of the SBCC Measured Term Contract. Please refer to document 7 within the tender document suite ("7. Schedule of Amendments - SBCC Measured Term);

Take cognisance of the ITT document which includes reference to all documentation that has to be completed/submitted and considered as part of this tender.

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

1 August 2025

Local time

12:00pm

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

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 6 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

1 August 2025

Local time

12:30pm

Place

Glasgow

Information about authorised persons and opening procedure

Group Procurement Officer, electronically

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.2) Information about electronic workflows

Electronic invoicing will be accepted

Electronic payment will be used

VI.3) Additional information

This contract is for a period of 2 years with an option to extend for 24 months at the sole discretion of the Group.

Economic operators may be excluded from this competition if they are in any of the situations referred to in regulation 58 of the Public

Contracts (Scotland) Regulations 2015.

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=800289.

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx.

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

Community benefits are included in this requirement. For more information see:

<https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

Please refer to Appendix 1 - ITT Document for details of expected community benefit
(SC Ref:800289)

Download the ESPD document here:

https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=800289

VI.4) Procedures for review

VI.4.1) Review body

Wheatley Group

25 Cochrane Street

Glasgow

G1 1HL

Email

neve.beaton@wheatley-group.com

Country

United Kingdom

Internet address

<http://www.wheatley-group.com>

VI.4.2) Body responsible for mediation procedures

Glasgow Sheriff Court and Justice of the Peace Court

1 Calton Place

Glasgow

G5 9DA

Country

United Kingdom

