

**United Kingdom-Leeds: Market research services**  
**OJ S 246/2019 20/12/2019**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: Border to Coast Pensions Partnership Ltd  
Postal address: 5th Floor, Toronto Square, Toronto Street  
Town: Leeds  
NUTS code: UK United Kingdom  
Postal code: LS1 2HJ  
Country: United Kingdom  
Contact person: procurement@bordertocoast.org.uk  
E-mail: [procurement@bordertocoast.org.uk](mailto:procurement@bordertocoast.org.uk)  
Telephone: +44 1134872550

**Internet address(es):**

Main address: <https://www.bordertocoast.org.uk/>  
Address of the buyer profile: <https://www.bordertocoast.org.uk/>

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

The contract is awarded by a central purchasing body

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://procontract.due-north.com/Login>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://procontract.due-north.com/Login>

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

Body governed by public law

**I.5. Main activity**

Economic and financial affairs

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**Section II: Object**

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

**II.1.1. Title**

Procurement for Investment Research Services  
Reference number: DN451655

**II.1.2. Main CPV code**

79310000 Market research services

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

Services

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

Procurement for investment research services.

### **II.1.5. Estimated total value**

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

This contract is divided into lots: yes

Tenders may be submitted for one lot only

The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Lot 1: Individual Countries (e.g. UK only, USA only or France only, etc.);

Lot 2: A singular Region, as defined in the Vendor Questionnaire, which may include multiple countries but not necessarily all countries in the defined region;

Lot 3: Multiple Regions as specified in the Vendor Questionnaire;

Lot 4: All Regions.

## **II.2. Description**

### **II.2.1. Title**

Lot 1: Individual Countries (e.g. UK only, USA only or France only, etc.)

Lot No: 1

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

79310000 Market research services, 79311400 Economic research services

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

NUTS code: UK United Kingdom

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

Border to Coast is inviting tenders for the provision of investment research services for its internally managed investments, comprising of listed equities and fixed income products.

The internal team is separated into 6 regions listed below which corresponds to the structure of the attached excel spreadsheet titled 'Vendor Questionnaire'.

— UK,

— US,

— Europe,

— Developed Asia,

— Emerging Markets,

— Japan.

It is Border to Coast's intention to procure investment research services that offer both global and regional coverage of the above listed regions. Applicants can apply for only 1 of the following lots:

Lot 1: Individual Countries (e.g. UK only, USA only or France Only, etc.);

Lot 2: A singular Region, as defined in the Vendor Questionnaire, which may include multiple countries but not necessarily all countries in the defined region;

Lot 3: Multiple Regions as specified in the Vendor Questionnaire;

Lot 4: All Regions.

Border to Coast seeks to appoint a combination of country, regional and multi-regional providers, in order to provide comprehensive, high quality coverage. Given that comprehensive, high-quality coverage is the priority of this procurement, the number of

selected providers may vary and will be determined by the results of the procurement process only. The evaluation criteria used will be the same for each provider. For scoring purposes, the providers will be grouped and compared to other providers who applied for the same lot. Not all lots will necessarily result in a contractual award.

The nature of the services required are detailed in the vendor questionnaire and clause 1 of the Research Services Agreement.

Should this procurement be successful and a contractual relationship be created between Border to Coast and the successful applicants, the attached 'Research Services Agreement' and 'Research Services Terms' will be used. Minor amendments to these documents may be considered following the awards and any comments you have to these documents must be detailed as part of your submission where indicated within the attached vendor questionnaire.

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

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

#### **II.2.6. Estimated value**

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

Duration in months: 12

This contract is subject to renewal: yes

Description of renewals:

The initial contract is for 1 year and is subject to an option to renew for 4 further periods of 1 year each.

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

Variants will be accepted: no

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

Options: no

#### **II.2.12. Information about electronic catalogues**

Tenders must be presented in the form of electronic catalogues or include an electronic catalogue

#### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

#### **II.2.14. Additional information**

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

##### **II.2.1. Title**

Lot No: 2

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

79310000 Market research services, 79311400 Economic research services

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

NUTS code: UK United Kingdom

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

Border to Coast is inviting tenders for the provision of investment research services for its internally managed investments, comprising of listed equities and fixed income products.

The internal team is separated into 6 regions listed below which corresponds to the structure of the attached excel spreadsheet titled 'Vendor Questionnaire'.

- UK,
- US,
- Europe,
- Developed Asia,
- Emerging Markets,
- Japan.

It is Border to Coast's intention to procure investment research services that offer both global and regional coverage of the above listed regions. Applicants can apply for only 1 of the following lots:

Lot 1: Individual Countries (e.g. UK only, USA only or France Only etc.);

Lot 2: A singular Region, as defined in the Vendor Questionnaire, which may include multiple countries but not necessarily all countries in the Defined region;

Lot 3: Multiple Regions as specified in the Vendor Questionnaire;

Lot 4: All Regions.

Border to Coast seeks to appoint a combination of country, regional and multi-regional providers, in order to provide comprehensive, high quality coverage. Given that comprehensive, high-quality coverage is the priority of this procurement, the number of selected providers may vary and will be determined by the results of the procurement process only. The evaluation criteria used will be the same for each provider. For scoring purposes, the providers will be grouped and compared to other providers who applied for the same lot. Not all lots will necessarily result in a contractual award.

The nature of the services required are detailed in the vendor questionnaire and clause 1 of the Research Services Agreement.

Should this procurement be successful and a contractual relationship be created between Border to Coast and the successful applicants, the attached 'Research Services Agreement' and 'Research Services Terms' will be used. Minor amendments to these documents may be considered following the awards and any comments you have to these documents must be detailed as part of your submission where indicated within the attached vendor questionnaire.

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

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

#### **II.2.6. Estimated value**

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

Duration in months: 12

This contract is subject to renewal: yes

Description of renewals:

The initial contract is for 1 year and is subject to an option to renew for 4 further periods of 1 year each.

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

Variants will be accepted: no

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

Options: no

#### **II.2.12.**

## **Information about electronic catalogues**

Tenders must be presented in the form of electronic catalogues or include an electronic catalogue

### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

### **II.2.14. Additional information**

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

##### **II.2.1. Title**

Lot No: 3

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

79310000 Market research services, 79311400 Economic research services

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

NUTS code: UK United Kingdom

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

Border to Coast is inviting tenders for the provision of investment research services for its internally managed investments, comprising of listed equities and fixed income products. The internal team is separated into 6 regions listed below which corresponds to the structure of the attached excel spreadsheet titled 'Vendor Questionnaire'.

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- Europe,
- Developed Asia,
- Emerging Markets,
- Japan.

It is Border to Coast's intention to procure investment research services that offer both global and regional coverage of the above listed regions. Applicants can apply for only 1 of the following Lots:

Lot 1: Individual Countries (e.g. UK only, USA only or France Only etc.);

Lot 2: A singular Region, as defined in the Vendor Questionnaire, which may include multiple countries but not necessarily all countries in the Defined region;

Lot 3: Multiple Regions as specified in the Vendor Questionnaire;

Lot 4: All Regions.

Border to Coast seeks to appoint a combination of country, regional and multi-regional providers, in order to provide comprehensive, high quality coverage. Given that comprehensive, high-quality coverage is the priority of this procurement, the number of selected providers may vary and will be determined by the results of the procurement process only. The evaluation criteria used will be the same for each provider. For scoring purposes, the providers will be grouped and compared to other providers who applied for the same lot. Not all lots will necessarily result in a contractual award.

The nature of the services required are detailed in the vendor questionnaire and clause 1 of the Research Services Agreement.

Should this procurement be successful and a contractual relationship be created between Border to Coast and the successful applicants, the attached 'Research Services Agreement' and 'Research Services Terms' will be used. Minor amendments to these documents may be

considered following the awards and any comments you have to these documents must be detailed as part of your submission where indicated within the attached vendor questionnaire.

**II.2.5. Award criteria**

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

**II.2.6. Estimated value**

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

Duration in months: 12

This contract is subject to renewal: yes

Description of renewals:

The initial contract is for 1 year and is subject to an option to renew for 4 further periods of 1 year each.

**II.2.10. Information about variants**

Variants will be accepted: no

**II.2.11. Information about options**

Options: no

**II.2.12. Information about electronic catalogues**

Tenders must be presented in the form of electronic catalogues or include an electronic catalogue

**II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds: no

**II.2.14. Additional information**

**II.2. Description**

**II.2.1. Title**

Lot No: 4

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

79310000 Market research services, 79311400 Economic research services

**II.2.3. Place of performance**

NUTS code: UK United Kingdom

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

Border to Coast is inviting tenders for the provision of investment research services for its internally managed investments, comprising of listed equities and fixed income products. The internal team is separated into 6 regions listed below which corresponds to the structure of the attached excel spreadsheet titled 'Vendor Questionnaire'.

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- Europe,
- Developed Asia,
- Emerging Markets,
- Japan.

It is Border to Coast's intention to procure investment research services that offer both global and regional coverage of the above listed regions. Applicants can apply for only 1 of the following lots:

Lot 1: Individual Countries (e.g. UK only, USA only or France Only etc.)

Lot 2: A singular Region, as defined in the Vendor Questionnaire, which may include multiple countries but not necessarily all countries in the Defined region.

Lot 3: Multiple Regions as specified in the Vendor Questionnaire.

Lot 4: All Regions.

Border to Coast seeks to appoint a combination of country, regional and multi-regional providers, in order to provide comprehensive, high quality coverage. Given that comprehensive, high-quality coverage is the priority of this procurement, the number of selected providers may vary and will be determined by the results of the procurement process only. The evaluation criteria used will be the same for each provider. For scoring purposes, the providers will be grouped and compared to other providers who applied for the same lot. Not all lots will necessarily result in a contractual award.

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

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

#### **II.2.6. Estimated value**

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

Duration in months: 12

This contract is subject to renewal: yes

Description of renewals:

The initial contract is for 1 year and is subject to an option to renew for 4 further periods of 1 year each.

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

Variants will be accepted: no

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

Options: no

#### **II.2.12. Information about electronic catalogues**

Tenders must be presented in the form of electronic catalogues or include an electronic catalogue

#### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

#### **II.2.14. Additional information**

### **Section IV: Procedure**

## **IV.1. Description**

### **IV.1.1. Type of procedure**

Open procedure

### **IV.1.3. Information about a framework agreement or a dynamic purchasing system**

### **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 in the OJ S: [2019/S 170-415434](#)

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

Date: 31/01/2020 Local time: 12:00

### **IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

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

English

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

Date: 31/01/2020 Local time: 12:00

## **Section VI: Complementary information**

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

This is a recurrent procurement: no

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

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

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

Official name: Border to Coast Pensions Partnership Ltd

Postal address: 5th Floor, Toronto Square, Toronto Street

Town: Leeds

Postal code: LS1 2HJ

Country: United Kingdom

E-mail: [procurement@bordertocoast.org.uk](mailto:procurement@bordertocoast.org.uk)

Telephone: +44 1134872550

### **VI.5. Date of dispatch of this notice**

17/12/2019