Do you know the peculiarities of a public tendering procedure of financial services that have to be taken into account?

- For many years, PPCmetrics has been giving advice and support to European clients concerning public tendering procedures of financial services (particularly asset management mandates, global custody, fund administration) according to international standards (e.g., Government Procurement Agreement, previously GATT/WTO).

- A public tendering procedure serves to identify the best and most cost-efficient provider of a service. Simultaneously, the principles of equal treatment of the providers, the comprehensible documentation, an effective competition as well as a high transparency have to be observed.

Public tendering procedures are compulsory for many governmental institutions. For non-public investors, a procedure according to these principles signals the highest professionalism in the awarding of financial services.

Our services

We can give advice and support when you are planning and realising the entire selection process:

- Choice of procedure

- Creation of all necessary documentation in collaboration with you.

- Realisation of the tendering procedure by strict adherence to the legal guidelines and the schedule.

- Evaluation of offers and moderation of meetings with the bidders

- If necessary, support with the contract negotiation and the transition.

Your advantages

- You profit from our long-term, Europe-wide experience in awarding financial services.

- You gain a unique insight in the market because of numerous providers.

- You award an asset management mandate according to a transparent, official public tendering procedure. This guarantees the highest professionalism in choosing the financial service provider.

Are you interested?

Dr. Stephan Skaanes, CFA, partner, (stephan.skaanes@ppcmetrics.ch) and Oliver Kunkel, senior consultant, (oliver.kunkel@ppcmetrics.ch) will give you further, non-committal information.