

Norway-Oslo: Tax consultancy services

OJ S 31/2019 13/02/2019

Contract notice

Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: Norges Bank Investment Management

National registration number: 937 884 117

Postal address: Bankplassen 2

Town: Oslo

NUTS code: NO011 Oslo

Postal code: 0151

Country: Norway

Contact person: Michelle von der Fehr

E-mail: NBIMprocurement@nbim.no

Telephone: +47 24073000

Internet address(es):

Main address: <http://www.nbim.no>

I.3. Communication

Access to the procurement documents is restricted. Further information can be obtained at:

<https://tendsign.no/doc.aspx?UniquelId=afbnnijrie&GoTo=Docs>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://tendsign.no/doc.aspx?UniquelId=afbnnijrie&GoTo=Tender>

I.4. Type of the contracting authority

National or federal agency/office

I.5. Main activity

Other activity: Central bank

Section II: Object

II.1. Scope of the procurement

II.1.1. Title

NBIM Procurement of Tax Consultancy Services

Reference number: 18/30

II.1.2. Main CPV code

79221000 Tax consultancy services

II.1.3. Type of contract

Services

II.1.4. Short description

The contract is for the procurement of tax consultancy and other related services. The procurement includes both signing contracts (Part A) and Framework Agreements (Part B), split between different mandates and sub-mandates.

Part A: Contracts will be signed (not a Framework Agreement) for the procurement of tax consultancy services with one tenderer for each Mandate 1 to 10 (excluding Mandate 6), and for the procurement of tax consultancy services with one tenderer for each Sub-Mandate 6.1 to 6.4; and

Part B: Framework Agreements will be signed for the procurement of tax consultancy services with a minimum of 2 tenderers and a maximum of 5 tenderers under each Framework Agreement within each Mandate 11 and 12. Further details on the mandates and sub-mandates, (which separately make up individual sub-contracts in the procurement), are given below in part II.2 and in the RFP document.

II.1.5. Estimated total value

II.1.6. Information about lots

This contract is divided into lots: yes

Tenders may be submitted for all lots

Maximum number of lots that may be awarded to one tenderer: 15
The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Part A: Sub-contract nos. 1 to 13.

Part B: Sub-contract nos. 14 and 15.

II.2. Description

II.2.1. Title

Mandate 1 — Tax Consultancy Services and Related Legal Consultancy Services for Norway
Lot No: 1

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Tax consultancy services and related legal consultancy services for Norway.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 2 - Tax consultancy services for the USA

Lot No: 2

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Tax consultancy services for the USA.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 3 - Consultancy services related to VAT for Great Britain
Lot No: 3

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo
NUTS code: UKI London

II.2.4. Description of the procurement

Consultancy services related to VAT for Great Britain.

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: 60
This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes
Description of options:
The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 4 - Compliance services related to VAT for Great Britain

Lot No: 4

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Compliance services related to VAT for Great Britain.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 5 - Reports on tax positions for global investments

Lot No: 5

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Reports on tax positions for global investments.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Sub-Mandate 6.1 - Reports on investment specific conditions and development characteristics within international taxation

Lot No: 6

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Reports on investment specific conditions and development characteristics within international taxation, development at over-national level.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Sub-Mandate 6.2 - Reports on investment specific conditions and development characteristics within international taxation

Lot No: 7

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Reports on investment specific conditions and development characteristics within international taxation, development relevant for global administrators.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Sub-Mandate 6.3 - Reports on investment specific conditions and development characteristics within international taxation

Lot No: 8

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Reports on investment specific conditions and development characteristics within international taxation, re-purchase of shares, etc.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Sub-Mandate 6.4 - Reports on investment specific conditions and development characteristics within international taxation

Lot No: 9

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Reports on investment specific conditions and development characteristics within international taxation, important tax related events for major corporations.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 7 - Global services related to tax for employees
Lot No: 10

II.2.2. Additional CPV code(s)

48000000 Software package and information systems, 79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo
NUTS code: UKI London

II.2.4. Description of the procurement

Global services related to tax for employees.

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: 60
This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes
Description of options:
The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description**II.2.1. Title**

Mandate 8 - Assistance with reports on services/benefits for employees in Great Britain
Lot No: 11

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Assistance with reports on services/benefits for employees in Great Britain.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 9 - Country-for-country reports

Lot No: 12

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Country-for-country reports.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 10 - Tax and accounting reports for the Singapore office

Lot No: 13

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Tax and accounting reports for the Singapore office.

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: 60

This contract is subject to renewal: no

II.2.10. Information about variants

Variants will be accepted: no

II.2.11.

Information about options

Options: yes

Description of options:

The contract will be valid for 5 years, with an option for an extension for a further 2 years, 1 year at a time (i.e., 5 + 1 + 1 year), with the right to give notice in accordance with the terms stated in Annex D.

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

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 11

Lot No: 14 - Global juridisk skatterådgivning

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo

NUTS code: UKI London

II.2.4. Description of the procurement

Global legal tax consultancy services.

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: 48

This contract is subject to renewal: no

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

II.2.14. Additional information

See the RFP document for further details.

II.2. Description

II.2.1. Title

Mandate 12 - Global tax consultancy services
Lot No: 15

II.2.2. Additional CPV code(s)

79100000 Legal services, 79200000 Accounting, auditing and fiscal services, 79220000 Fiscal services, 79221000 Tax consultancy services, 79400000 Business and management consultancy and related services

II.2.3. Place of performance

NUTS code: NO011 Oslo
NUTS code: UKI London

II.2.4. Description of the procurement

Global tax consultancy services.

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: 48
This contract is subject to renewal: no

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

II.2.14. Additional information

See the RFP document for further details.

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:

1) Requirement: tenderers must be a legally established company, partnership, or other suitable business structure, which is organised in accordance with the legislation in the country where they operate. Documentation requirement: company registration certificate from the register of business enterprises, professional register or a trade register in the country where the tenderer is established

2) Requirement for Norwegian companies only: tenderers must practice their business in accordance with Norwegian laws and regulations on payment and reports on tax and duties. Documentation requirement: tax certificate, not older than 6 months calculated from the deadline for submitting a tender in the contest. Further details, including the documentation requirements and the ESPD form, are in the RFP document.

III.1.3. Technical and professional ability

List and brief description of selection criteria:

3) Requirement: tenderers must have experience from equivalent contracts. Documentation requirement: An overview of the most important services that the tenderer has carried out in the last three years, together with information on the contract value, date of delivery or execution and name of the recipient.

4) Requirement: tenderers must have sufficient personnel with the required tax competence and other professional competence that is required for giving timely advice on tax questions connected to capital management for a large global investor. Documentation requirement: Information on the tenderer's education and the professional qualifications. Further details, including the documentation requirements and the ESPD form, are in the RFP document.

III.2. Conditions related to the contract

III.2.2. Contract performance conditions

The contract will contain requirements related to wage and working conditions, documentation and sanctions in accordance with regulation no. 112 dated 8.2.2008 on wages and working conditions in public contracts.

Further details are in the draft of the contract and Framework Agreement.

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.1.3. Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

Framework agreement with several operators Envisaged maximum number of participants to the framework agreement: 5

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: 14/03/2019 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.2.6. Minimum time frame during which the tenderer must maintain the tender
Tender must be valid until: 31/07/2019

IV.2.7. Conditions for opening of tenders
Date: 14/03/2019 Local time: 12:15

Section VI: Complementary information

VI.1. Information about recurrence
This is a recurrent procurement: no

VI.3. Additional information
Visma notice: <https://opic.com/id/afbnnijrie>

VI.4. Procedures for review

VI.4.1. Review body
Official name: Klagenemnda for offentlige anskaffelser
Town: Bergen
Country: Norway

VI.5. Date of dispatch of this notice
08/02/2019