

**Norway-Oslo: Financial and insurance services**

OJ S 73/2018 14/04/2018

**Contract notice****Services****Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Pensjonstrygden for sjømenn

National registration number: 940 415 683

Postal address: Nedre Vollgate 11

Town: Oslo

NUTS code: NO011 Oslo

Postal code: 0034

Country: Norway

Contact person: Erik Viken

E-mail: [Erik.Viken@pts.no](mailto:Erik.Viken@pts.no)

Telephone: +47 22358900

**Internet address(es):**Main address: <http://www.pts.no>Address of the buyer profile: <https://kgv.doffin.no/ctm/Company/CompanyInformation/Index/1071>**I.3. Communication**The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://kgv.doffin.no/ctm/Supplier/Documents/Folder/160900>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted to the abovementioned address

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

National or federal agency/office

**I.5. Main activity**

General public services

**Section II: Object**

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**II.1. Scope of the procurement****II.1.1. Title**

Capital management services

Reference number: T-2018-3

**II.1.2. Main CPV code**

66000000 Financial and insurance services

**II.1.3. Type of contract**

Services

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

Consultancy services and operative work for the management of PTS' capital.

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

#### **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, 66500000 Insurance and pension services

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

NUTS code: NO011 Oslo

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

PTS has a goal of being competitive within capital management by maximising long-term returns on PTS' total properties. The resources in PTS shall be managed in a proper and good way. PTS' resources shall be entirely managed externally. The managers shall act in accordance with their mandates and fulfil the security requirements as regards settlement risk, disloyalty, etc.

PTS would like the following services to be delivered by the Tenderer as a part of this Contract:

- annual preparation / revision of an investment strategy,
- proposals for the choice and follow-up of managers (annual),
- portfolio construction (annual review),
- accounts reports,
- continual reports in board meetings,
- reports to the department in accordance with the management set-up for the fund management,
- continual advice on the redistribution and replacement of funds.

#### **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**

Start: 01/07/2018 End: 31/12/2021

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**

## Section III: Legal, economic, financial and technical information

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### 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:  
See the attached tender documentation.

#### III.1.2. Economic and financial standing

List and brief description of selection criteria:  
See the attached tender documentation.

#### III.1.3. Technical and professional ability

List and brief description of selection criteria:  
See the attached tender documentation.

### III.2. Conditions related to the contract

#### III.2.2. Contract performance conditions

Tenderers must be independent as regards capital managers and products in the financial market and not offer their own products or exercise any concession of active management. The independency must also apply to ownership interests, financial interests or other commitments of the managers.

## Section IV: Procedure

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

Date: 18/05/2018 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

Norwegian

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

Duration in months: 2 (from the date stated for receipt of tender)

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

Date: 18/05/2018 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: Klagenemnda for offentlige anskaffelser

Town: Bergen

Country: Norway

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

13/04/2018