

Norway-Drammen: Trust services
OJ S 132/2016 12/07/2016
Contract notice
Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: Sykehuspartner HF
National registration number: 991324968
Postal address: Postboks 3562
Town: Drammen
Postal code: 3007
Country: Norway
Contact person: Rolf Ruth
For the attention of: Innkjøp SP
E-mail: innkjop-sp@sykehuspartner.no
Telephone: +47 32235300

Internet address(es):

Address of the buyer profile: <https://kgv.doffin.no/ctm/Supplier/CompanyInformation/Index/3609>
Electronic access to information: <https://kgv.doffin.no/ctm/Supplier/Documents/Folder/145927>

Additional information can be obtained from:

the abovementioned address

Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from:

the abovementioned address

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

I.2. Type of the contracting authority

Body governed by public law

I.3. Main activity

Health

I.4. Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: yes

Official name: The Pension Fund for the health authorities in the Capital area

National registration number: 912 805 174

Postal address: Grev Wedels plass 5

Town: Oslo

Postal code: 0151

Country: Norway

Section II: Object of the contract

II.1. Description

II.1.1.

Title attributed to the contract by the contracting authority

The procurement of investment consultancy services and reporting to the Pension Fund for the health authorities in the Capital area (PKH).

II.1.2. Type of contract and place of performance or delivery

Services

Service category No 6: Financial services a) Insurances services b) Banking and investment services

Main site or place of performance: Oslo.

NUTS code NO Norge

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

The notice involves a public contract

II.1.4. Information about framework agreement

II.1.5. Short description of the contract or purchase(s)

The service shall cover ongoing advisory services for asset management of the pension fund's combined funds, including all regulatory reporting, risk reporting, stress testing. The Consultant shall aid in the development of risk strategies, Asset management strategies to be undertaken annually by PKH's management. Advisor shall also aid with evaluation of all management mandates in agreement with PKH's administration. The assignment will also include screening and assessing of possible suppliers of management services and determining of mandates. The advisor shall cover all asset classes permitted for pension funds, including shares, fixed income, real estate, derivatives and different instruments within alternative investments. Advisor must also have a license to manage the pension fund's fund so that the advisor can undertake the management if there is a need for PKH.

II.1.6. CPV code(s)

66161000 Trust services, 66131100 Pension investment services, 66141000 Pension fund management services, 79910000 Management holdings services, 66523100 Pension fund administration services, 66523000 Pension fund consultancy services, 79400000 Business and management consultancy and related services, 66171000 Financial consultancy services, 66150000 Financial markets administration services

II.1.7. Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: no

II.1.8. Lots

This contract is divided into lots: no

II.1.9. Information about variants

Variants will be accepted: no

II.2. Scope of the procurement

II.2.1. Total quantity or scope

The contract period for the framework agreement is 4 years, with the option of an extension for a further 2 years (1+1).

II.2.2. Information about options

Options: yes

Description of options: Option for an extension of the agreement for an additional 1 year + 1 year.

Provisional timetable for recourse to these options:
in months: 24 (from the award of the contract)

II.2.3. Information about renewals

This contract is subject to renewal: no

II.3. Duration of the contract or time limit for completion

Start 1.1.2017. Completion 31.12.2020

Section III: Legal, economic, financial and technical information

III.1. Conditions related to the contract

III.1.1. Deposits and guarantees required

III.1.2. Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them

III.1.3. Legal form to be taken by the group of economic operators to whom the contract is to be awarded

III.1.4. Contract performance conditions

The performance of the contract is subject to particular conditions: no

III.2. Conditions for participation

III.2.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions: Requirement: The tenderer shall submit certificates for tax and VAT.

Documentation: – Tax and VAT certificate.

The certificate must not be more than 6 months from the tender deadline. Any arrears must be explained / justified.

– Foreign tenderers must submit equivalent confirmation or self-declaration that government taxes and fees have been paid in the country where the tenderer has their place of business.

Requirement: Information verifying reliable professional conduct.

Documentation: – If during the past 5 years the tenderer has been convicted of corruption, fraud or money laundering, or committed criminal offences concerning professional conduct, the judgement and case must be accounted for.

Requirement: The tenderers must be a legally established company.

Documentation: – Norwegian tenderers must provide an updated business registration certificate.

– Foreign tenderers shall provide certificate(s) of statutory registration in the country where the business is established.

III.2.2. Economic and financial ability

List and brief description of conditions: The Contracting Authority will evaluate the tenderer's fulfilment of the qualification requirements in the following manner:

– Latest submitted annual financial statements with notes including auditor's report.

– Income statement and balance sheet for the last 6 months if it is more than 6 months since the last annual report.

– Suppliers are free to substantiate their economic and financial standing by any other document, including for example by a parent company guarantee.

The contracting authority will obtain rating reports from www.solidtet.no (delivered by Bisnode Credit AS) to verify that the suppliers have sufficient economic and financial ability. During the evaluation, the Contracting Authority will place emphasis on tenderers who have profitable operations, positive cash flow in the last few years and positive equity. Minimum level(s) of standards possibly required: The tenderer shall have sufficient economic and financial solidity to fulfil the contract obligations.

III.2.3. Technical and professional ability

List and brief description of conditions:

- A short and general description of the company and the company's organisation and areas of activity.
- A statement which verifies that the tenderer has the ability and capacity to undertake the assignment.

A list with a short description of the most important and most relevant deliveries related to this concrete assignment in the last 3 years, including information on value and date, as well as the name of the public or private contracting authority.

- If the tenderer relies on other companies' capacity, it shall be substantiated to the contracting authority that necessary resources are at the tenderer's disposal. This can be done by presenting a statement of obligation (annex 5) from the relevant company(ies) that the tenderer will rely on. The statement shall state that the tenderer has access to the necessary resources during the entire contract period
- The tenderer shall give a statement of routines for compliance with the concession requirements the Pension Fund is under, in relation to services provided. This includes i.a. the Regulations for Risk management and Internal control, the Personal Data Act — the ICT Regulations as well as the future Solvens II Regulations.

Minimum level(s) of standards possibly required:

The tenderer shall have good qualifications and capacity in relation to the contractual obligations.

III.2.4. Information about reserved contracts

III.3. Conditions specific to services contracts

III.3.1. Information about a particular profession

Execution of the service is reserved to a particular profession: no

III.3.2. 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: yes

Section IV: Procedure

IV.1. Type of procedure

IV.1.1. Type of procedure

Negotiated

Some candidates have already been selected (if appropriate under certain types of negotiated procedures) no

IV.1.2. Information about the limits on the number of candidates to be invited

IV.1.3. Information about reduction of the number of solutions or tenders during negotiation or dialogue

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated no

IV.2. Award criteria

IV.2.1. Award criteria

The most economically advantageous tender in terms of Price is not the only award criterion and all criteria are stated only in the procurement documents

IV.2.2. Information about electronic auction

An electronic auction will be used: no

IV.3. Administrative information

IV.3.1. File reference number attributed by the contracting authority

16/00646

IV.3.2. Previous publication concerning this procedure

Prior information notice

Notice number in the OJ S: [2014/S 222-393286](#) of 18.11.2014

IV.3.3. Conditions for obtaining specifications and additional documents or descriptive document

Payable documents: no

IV.3.4. Time limit for receipt of tenders or requests to participate

22.8.2016 - 12:00

IV.3.5. Estimated date of dispatch of invitations to tender or to participate to selected candidates

IV.3.6. Languages in which tenders or requests to participate may be submitted

Other: Norwegian.

IV.3.7. Minimum time frame during which the tenderer must maintain the tender

IV.3.8. Conditions for opening of tenders

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: no

VI.2. Information about European Union funds

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

VI.3. Additional information

VI.4. Procedures for review

VI.4.1. Review body

VI.4.2. Review procedure

VI.4.3. Service from which information about the review procedure may be obtained

VI.5. Date of dispatch of this notice

7.7.2016