

**Norway-Oslo: Financial consultancy services**  
**OJ S 195/2013 08/10/2013**  
**Contract notice**  
**Services**

**Directive 2004/18/EC**

**Section I: Contracting authority**

---

**I.1. Name and addresses**

Official name: Opplysningsvesenets Fond  
Postal address: Rådhusgata 1-3, Postboks 535 Sentrum  
Town: Oslo  
Postal code: 0105  
Country: Norway  
Contact person: Finansteam  
For the attention of: Harald Magne Glomdal  
E-mail: [hmg@ovf.no](mailto:hmg@ovf.no)  
Telephone: +47 23081500  
Fax: +47 23081501

**Internet address(es):**

General address of the contracting authority: <http://www.ovf.no>  
Address of the buyer profile: [http://www.doffin.no/search/Search\\_AuthProfile.aspx?ID=AA4061](http://www.doffin.no/search/Search_AuthProfile.aspx?ID=AA4061)

**Additional information can be obtained from:**

Official name: Opplysningsvesenets Fond  
Postal address: Rådhusgata 1-3, Postboks 535 Sentrum  
Town: Oslo  
Postal code: 0105  
Country: Norway  
Contact person: Finansteam  
For the attention of: Harald Magne Glomdal  
E-mail: [hmg@ovf.no](mailto:hmg@ovf.no)  
Telephone: +47 23081500  
Fax: +47 23081501

Internet address: <http://www.ovf.no>

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

Official name: Opplysningsvesenets Fond  
Postal address: Rådhusgata 1-3, Postboks 535 Sentrum  
Town: Oslo  
Postal code: 0105  
Country: Norway  
Contact person: Finansteam  
For the attention of: Harald Magne Glomdal  
E-mail: [hmg@ovf.no](mailto:hmg@ovf.no)  
Telephone: +47 23081500  
Fax: +47 23081501  
Internet address: <http://www.ovf.no>

**Tenders or requests to participate must be submitted:** Official name: Opplysningsvesenets  
Fond  
Postal address: Rådhusgata 1-3, Postboks 535 Sentrum  
Town: Oslo  
Postal code: 0105  
Country: Norway  
Contact person: Finansteam  
For the attention of: Harald Magne Glomdal  
E-mail: [hmg@ovf.no](mailto:hmg@ovf.no)  
Telephone: +47 23081500  
Fax: +47 23081501  
Internet address: <http://www.ovf.no>

**I.2. Type of the contracting authority**

Other: Special law foundation

**I.3. Main activity**

Economic and financial affairs

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

The contracting authority is purchasing on behalf of other contracting authorities: no

---

**Section II: Object of the contract**

**II.1. Description**

**II.1.1. Title attributed to the contract by the contracting authority**

Tender contest, financial consultant.

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

Services

Service category No 27: Other services

Main site or place of performance: Oslo, Norway.

NUTS code

**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)**

Opplysningsvesenets fond (Ovf), henceforth referred to as the Awarding Authority, requests an independent financial consultants who can contribute to the following:

- Create a new investment mandate for the Awarding Authority.
- Strategic financial consultancy service.
- Selection of managers.
- Transaction management.
- Reporting and accounting.
- Other financial consultancy services

NOTE: To register your interest in this notice and obtain any additional information please visit the Doffin Web Site at [http://www.doffin.no/Search/Search\\_Switch.aspx?ID=307183](http://www.doffin.no/Search/Search_Switch.aspx?ID=307183)

**II.1.6. CPV code(s)**

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

**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**

1. The consultancy service regarding establishment of a new investment mandate will apply for 2014, only.
  2. Close cooperation with the Awarding Authority regarding strategic financial consultancy must be expected. Monthly.
  3. The consultant shall have independent responsibility for the selection of managers. I.a. by following up and finding a competent managers. Personnel from the Awarding Authority shall participate in this process.
  4. The consultant shall provide assistance with transaction management in connection with alteration of allocation.
  5. Monthly reporting shall be provided for the portfolio subject to managers selection by the consultant.
  6. Other financial consultancy is ad hoc based
- Estimated value excluding VAT:  
Range: between 3 000 000 and 5 000 000 NOK

**II.2.2. Information about options**

Options: yes

Description of options: The contract period is four years. Option for 1 year + 1 year prolongation

**II.2.3. Information about renewals**

This contract is subject to renewal: yes

Number of possible renewals: 2

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

Duration in months: 48 (from the award of the contract)

**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**

See the tender documents

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

Business formations which may receive concession in accordance with the Act on securities trading

### **III.1.4. Contract performance conditions**

The performance of the contract is subject to particular conditions: yes

Description of particular conditions: See the tender documents

### **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: (1) Company registration certificate.

(2) Value added tax certificate (National requirement)

(3) Company tax certificate (National requirement)

(4) Self-declaration in compliance with Appendix 2 (HSE) of the Norwegian procurement regulations (National requirement)

(5) Other documentation required (please state below)

The tenderer must have relevant permission from the Financial Supervisory Authority of Norway or equivalent supervisory authorities in EEA countries

#### **III.2.2. Economic and financial ability**

List and brief description of conditions: (1) The company's most recent annual report including new information of relevance to the company's accounting figures

(2) Presentation of the company's annual accounts, or extracts thereof

(3) Statement of the company's turnover, of relevance to this contract, for previous years

(4) Other documentation required (please state below)

Self declaration regarding corruption. References in accordance with the tender documents

#### **III.2.3. Technical and professional ability**

List and brief description of conditions:

(1) Overview of the company's total manpower

(2) Manpower proposed for this contract (organisation chart) with names and CV's of the key personnel who will be responsible for its execution (for service and works contracts)

(3) A list of the principal deliveries effected, or main services provided, by the company, in the past 3 years, with the values, dates and recipients (for supply and service contracts)

(4) A statement of the quality assurance/quality control system operated by the company.

#### **III.2.4. Information about reserved contracts**

### **III.3. Conditions specific to services contracts**

#### **III.3.1. Information about a particular profession**

#### **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**

Envisaged minimum number 3: and Maximum number 5  
Objective criteria for choosing the limited number of candidates: See the tender documents

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

#### **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**

Finansiell rådgiver

##### **IV.3.2. Previous publication concerning this procedure**

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

Time limit for receipt of requests for documents or for accessing documents: 31.10.2013

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

6.11.2013 - 15:00

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

12.11.2013

##### **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**

##### **VI.2. Information about European Union funds**

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

See the tender documents  
(NT Ref:307229)

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

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

Official name: Opplysningsvesenets fond  
Postal address: Postboks 535 Sentrum

Town: Oslo  
Postal code: 0105  
Country: Norway  
E-mail: [ovf@ovf.no](mailto:ovf@ovf.no)

**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**

4.10.2013