

**Denmark-Copenhagen: Portfolio management services**

OJ S 237/2020 04/12/2020

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

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Danmarks Grundforskningsfond

National registration number: 17730290

Postal address: Holbergsgade 14, 1

Town: København K

NUTS code: DK Danmark

Postal code: 1057

Country: Denmark

Contact person: DG — Boje Thosti

E-mail: [bt@dg.dk](mailto:bt@dg.dk)

Telephone: +45 24255859

**Internet address(es):**Main address: [www.dg.dk](http://www.dg.dk)**I.3. Communication**

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

[http://eu.eu-supply.com/app/rfq/rwlenrance\\_s.asp?PID=281810&B=KA](http://eu.eu-supply.com/app/rfq/rwlenrance_s.asp?PID=281810&B=KA)

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: [http://eu.eu-supply.com](http://eu.eu-supply.com/app/rfq/rwlenrance_s.asp?PID=281810&B=KA)[/app/rfq/rwlenrance\\_s.asp?PID=281810&B=KA](http://eu.eu-supply.com/app/rfq/rwlenrance_s.asp?PID=281810&B=KA)

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

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

Body governed by public law

**I.5. Main activity**

Other activity: Funding of basic research activities

**Section II: Object**

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

Portfolio Management of Global Inflation-linked Bonds

**II.1.2. Main CPV code**

66140000 Portfolio management services

**II.1.3. Type of contract**

Services

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

The Danish National Research Foundation (Danmarks Grundforskningsfond) calls for tenders for a contract concerning portfolio management of global inflation-linked bonds currently worth around DKK 600 million as a segregated account (The mandate) hedged to EUR. The term of the contract is expected to be five (5) years. The annual portfolio fee should be dependent on the size of the portfolio and a minimum fee, if any, but without performance fee.

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

Value excluding VAT: 2 000 000,00 DKK

#### **II.1.6. Information about lots**

This contract is divided into lots: no

### **II.2. Description**

#### **II.2.2. Additional CPV code(s)**

66140000 Portfolio management services

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

NUTS code: DK Danmark

Main site or place of performance: København K.

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

See II.1.4).

#### **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**

Value excluding VAT: 2 000 000,00 DKK

#### **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: 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:

Tenderers must have authorisation to carry out investment services in Denmark, including portfolio management and investment advice. See tender material, Appendix B: Tender conditions, para 4.2.

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

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

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

### **III.2.1. Information about a particular profession**

Execution of the service is reserved to a particular profession Reference to the relevant law, regulation or administrative provision:

Consolidated Act No 937 of 6 September 2019 on Financial Business as amended (In Danish: Lov om finansiel virksomhed).

### **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**

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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: 20/01/2021 Local time: 23:59

#### **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**

Duration in months: 8 (from the date stated for receipt of tender)

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

Date: 20/01/2021 Local time: 23:59

Place:

Opening of the tenders will not be public.

## **Section VI: Complementary information**

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## **VI.1. Information about recurrence**

This is a recurrent procurement: no

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

All communication and information concerning the procurement are performed using electronic means of communication only.

The electronic procurement system is accessible via 'Digitale Udbud' <https://eu.eu-supply.com/login.asp?B=KA>

Further guidance is available here: [https://eu.eusupply.com/img/brandings/ka\\_quickguide\\_en.pdf](https://eu.eusupply.com/img/brandings/ka_quickguide_en.pdf)

Any challenges concerning the use of the electronic procurement system may be solved as described in the system by email to: [dksupport@eu-supply.com](mailto:dksupport@eu-supply.com) or telephone +45 70208014.

The tender as well as all communication and documents must be in English. However, documents in Danish that have not previously been translated into English, may be Submitted in Danish.

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

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

Official name: Klagenævnet for Udbud

Postal address: Nævnenes Hus, Toldboden 2

Town: Viborg

Postal code: 8800

Country: Denmark

E-mail: [klfu@naevneneshus.dk](mailto:klfu@naevneneshus.dk)

Telephone: +45 72405600

Internet address: <https://klfu.naevneneshus.dk/>

### **VI.4.3. Review procedure**

Precise information on deadline(s) for review procedures:

Review procedures are laid down in Consolidated Act No 593 of 2 June 2016 on the Danish Complaints Board for Public Procurement, see [www.retsinformation.dk](http://www.retsinformation.dk)

Any complaints must be filed with the Complaints Board within 45 calendar days after the contracting authority's publication of a notice in the Official Journal of the European Union that a contract has been concluded. The deadline starts the day after publication of the notice. The complainant is obliged to simultaneously inform the contracting authority that a complaint has been filed with the Complaints Board. Also, the complainant must inform whether the complaint has been filed during the stand still period, and, if not, whether suspensory effect is sought for. More information may be obtained from the Complaints Board, see <https://naevneneshus.dk/media/9802/complaint-guidelines.pdf>

### **VI.4.4. Service from which information about the review procedure may be obtained**

Official name: Konkurrence- og Forbrugerstyrelsen

Postal address: Carl Jacobsens Vej 35

Town: Valby

Postal code: 2500

Country: Denmark

E-mail: [kfst@kfst.dk](mailto:kfst@kfst.dk)

Telephone: +45 41715000

Internet address: <http://www.kfst.dk>

## **VI.5.**

**Date of dispatch of this notice**

01/12/2020