

**Sweden-Stockholm: Financial and insurance services**  
**OJ S 119/2017 24/06/2017**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: Stiftelsen för Kunskaps- och Kompetensutveckling

National registration number: 802400-4213

Postal address: Birger Jarslgatan 16

Town: Stockholm

NUTS code: SE11 Stockholm

Postal code: 114 34

Country: Sweden

Contact person: Britt-Marie Granting

E-mail: [britt-marie.granting@kks.se](mailto:britt-marie.granting@kks.se)

**Internet address(es):**

Main address: <http://www.kks.se>

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://tendsign.com/doc.aspx?Uniqueld=afdpbdrtbg&GoTo=Docs>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://tendsign.com/doc.aspx?Uniqueld=afdpbdrtbg&GoTo=Tender>

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

Other type: public foundation

**I.5. Main activity**

Other activity: financing and supporting research

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**Section II: Object**

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

**II.1.1. Title**

Public procurement of asset management services — Swedish mandate.

Reference number: 17/4

**II.1.2. Main CPV code**

66000000 Financial and insurance services

**II.1.3. Type of contract**

Services

**II.1.4. Short description**

The procurement concerns asset management services in the form of discretionary portfolio management in respect of financial instruments.

**II.1.5. Estimated total value**

**II.1.6. Information about lots**

This contract is divided into lots: no

**II.2. Description**

**II.2.3. Place of performance**

NUTS code: SE11 Stockholm

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

Through the procurement, the foundation is looking for active managers, with excellent track records and high quality investment teams that are stable over time. Relevant investment teams should not manage too large portfolios of assets, as management may then become constrained by market liquidity. The foundation places great emphasis on a manager's ability to timely change relevant allocations between equities and fixed income instruments, as well as on how much the manager has proven to deviate from the strategic allocation of its relevant benchmarks. Of significance is also a manager's stock-picking capability and skill to have a large number of truly active positions in a portfolio without a very high risk compared to the benchmark. Finally, the foundation is looking for managers that care for sustainability issues in a broad sense. In parallel with the procurement, the foundation carries out 2 additional, wholly separate procurements of asset management services concerning a Global mandate and an Absolute return mandate (the parallel procurements). A tenderer may submit a tender for the procurement as well as 1 or both of the parallel procurements, and, as illustration only, if a tenderer has submitted a tender for all 3 procurements, such tenderer may be awarded with none, 1, 2 or 3 mandates.

**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**

**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**

The procurement involves the establishment of a framework agreement  
Framework agreement with several operators

### **IV.1.8. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: no

## **IV.2. Administrative information**

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

Date: 25/08/2017 Local time: 17:00

### **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: 30/06/2018

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

Date: 25/08/2017 Local time: 17:15

## **Section VI: Complementary information**

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

This is a recurrent procurement: no

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

Visma notice: <https://opic.com/id/afdpbdrbtbg>

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

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

Official name: Förvaltningsrätten i Stockholm

Town: Stockholm

Country: Sweden

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

Official name: Stiftelsen för Kunskaps- och Kompetensutveckling

Town: Stockholm

Country: Sweden

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

22/06/2017