

**Sweden-Stockholm: Pension investment services**  
**OJ S 227/2018 24/11/2018**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

---

**I.1. Name and addresses**

Official name: AP7 Seventh Swedish National Pension Fund

Postal address: Vasagatan 16

Town: Stockholm

NUTS code: SE11 Stockholm

Postal code: 101 21

Country: Sweden

Contact person: c/o PPCmetrics AG

E-mail: [ap7\\_tender@ppcmetrics.ch](mailto:ap7_tender@ppcmetrics.ch)

**Internet address(es):**

Main address: [www.ap7.se/en](http://www.ap7.se/en)

Address of the buyer profile: [www.ap7.se/en](http://www.ap7.se/en)

**I.3. Communication**

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

<https://www.ap7.se/kontakt/upphandlingar/>

Additional information can be obtained from another address:

Official name: PPCmetrics AG

Postal address: Badenerstrasse 6

Town: Zurich

NUTS code: CH04 Zürich

Postal code: 8021

Country: Switzerland

E-mail: [ap7\\_tender@ppcmetrics.ch](mailto:ap7_tender@ppcmetrics.ch)

**Internet address(es):**

Main address: [www.ppcmetrics.ch](http://www.ppcmetrics.ch)

Address of the buyer profile: [www.ap7.se/en](http://www.ap7.se/en)

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

Official name: PPCmetrics AG

Postal address: Badenerstrasse 6

Town: Zurich

Postal code: 8021

Country: Switzerland

E-mail: [ap7\\_tender@ppcmetrics.ch](mailto:ap7_tender@ppcmetrics.ch)

NUTS code: CH04 Zürich

**Internet address(es):**

Main address: [www.ppcmetrics.ch](http://www.ppcmetrics.ch)

Address of the buyer profile: [www.ap7.se/en](http://www.ap7.se/en)

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

National or federal agency/office

#### **I.5. Main activity**

Other activity: Provider of government run fund within the Swedish Premium Pension System

### **Section II: Object**

---

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

##### **II.1.1. Title**

Investment Management Services: "Active Alpha Management"

##### **II.1.2. Main CPV code**

66131100 Pension investment services

##### **II.1.3. Type of contract**

Services

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

AP7 issues an invitation to tender for an Investment Management Agreement. The objective of the tender is to render discretionary asset management services for Active Alpha Management. In total, 6 — 10 mandates will be awarded with a total volume of up to 20 000 000 000 SEK. All information is provided in the procurement guidelines.

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

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

This contract is divided into lots: yes  
Tenders may be submitted for all lots

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

##### **II.2.1. Title**

Lot 1: L/S Equities: Region USA  
Lot No: 1

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

66131100 Pension investment services

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

NUTS code: SE11 Stockholm  
Main site or place of performance: All information is provided in the procurement guidelines.

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

All information is provided in the procurement guidelines.

##### **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: 36

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract will be for a period of three (3) years from the award of the mandate with option of two (2) further extensions of two (2) years each. All information is provided in the procurement guidelines.

#### **II.2.9. Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 1Maximum number: 3Objective criteria for choosing the limited number of candidates:

All information is provided in the procurement guidelines.

#### **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**

All information is provided in the procurement guidelines.

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

#### **II.2.1. Title**

Lot 2: L/S Equities: Region Europe

Lot No: 2

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

66131100 Pension investment services

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

NUTS code: SE11 Stockholm

Main site or place of performance: All information is provided in the procurement guidelines.

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

All information is provided in the procurement guidelines.

#### **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: 36

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract will be for a period of three (3) years from the award of the mandate with option of two (2) further extensions of two (2) years each. All information is provided in the procurement guidelines.

#### **II.2.9.**

## **Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 1Maximum number: 3Objective criteria for choosing the limited number of candidates:

All information is provided in the procurement guidelines.

### **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**

All information is provided in the procurement guidelines.

## **II.2. Description**

### **II.2.1. Title**

Lot 3: L/S Equities: Region Japan

Lot No: 3

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

66131100 Pension investment services

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

NUTS code: SE11 Stockholm

Main site or place of performance: All information is provided in the procurement guidelines.

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

All information is provided in the procurement guidelines.

### **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: 36

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract will be for a period of three (3) years from the award of the mandate with option of two (2) further extensions of two (2) years each. All information is provided in the procurement guidelines.

### **II.2.9. Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 1Maximum number: 3Objective criteria for choosing the limited number of candidates:

All information is provided in the procurement guidelines.

### **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**

All information is provided in the procurement guidelines.

## **II.2. Description**

### **II.2.1. Title**

Lot 4: L/S Equities: Global/Multi Region  
Lot No: 4

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

66131100 Pension investment services

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

NUTS code: SE11 Stockholm

Main site or place of performance: All information is provided in the procurement guidelines.

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

All information is provided in the procurement guidelines.

### **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: 36

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract will be for a period of three (3) years from the award of the mandate with option of two (2) further extensions of two (2) years each. All information is provided in the procurement guidelines.

### **II.2.9. Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 1Maximum number: 3Objective criteria for choosing the limited number of candidates:

All information is provided in the procurement guidelines.

### **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**

All information is provided in the procurement guidelines.

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

#### **II.2.1. Title**

Lot 5: Currency Management

Lot No: 5

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

66131100 Pension investment services

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

NUTS code: SE11 Stockholm

Main site or place of performance: All information is provided in the procurement guidelines.

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

All information is provided in the procurement guidelines.

#### **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: 36

This contract is subject to renewal: yes

Description of renewals:

The duration of the contract will be for a period of three (3) years from the award of the mandate with option of two (2) further extensions of two (2) years each. All information is provided in the procurement guidelines.

#### **II.2.9. Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 1Maximum number: 3Objective criteria for choosing the limited number of candidates:

All information is provided in the procurement guidelines.

#### **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**

All information is provided in the procurement guidelines.

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

---

#### **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:

All information is provided in the procurement guidelines.

### **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.2.2. Contract performance conditions**

All information is provided in the procurement guidelines.

## **Section IV: Procedure**

---

### **IV.1. Description**

#### **IV.1.1. Type of procedure**

Competitive procedure with negotiation

#### **IV.1.3. Information about a framework agreement or a dynamic purchasing system**

#### **IV.1.4. 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

#### **IV.1.5. Information about negotiation**

The contracting authority reserves the right to award the contract on the basis of the initial tenders without conducting negotiations

#### **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: 26/12/2018 Local time: 17:00

#### **IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

Date: 11/01/2019

#### **IV.2.4. Languages in which tenders or requests to participate may be submitted**

English

## **Section VI: Complementary information**

---

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

This is a recurrent procurement: no

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

All information is provided in the procurement guidelines.

**VI.4. Procedures for review**

**VI.4.1. Review body**

Official name: AP7

Town: Stockholm

Country: Sweden

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

21/11/2018