



SABO SVERIGES ALLMÄNNYTTIGA BOSTADSFÖRETAG

Swedish Construction market & The Municipal Housing companies

Infrastructure Opportunities in Sweden | Stockholm. 20161103

Program

1. Swedish construction market
2. The municipal housing companies in Sweden
3. One way to enter the Swedish market
Kombohus Flex

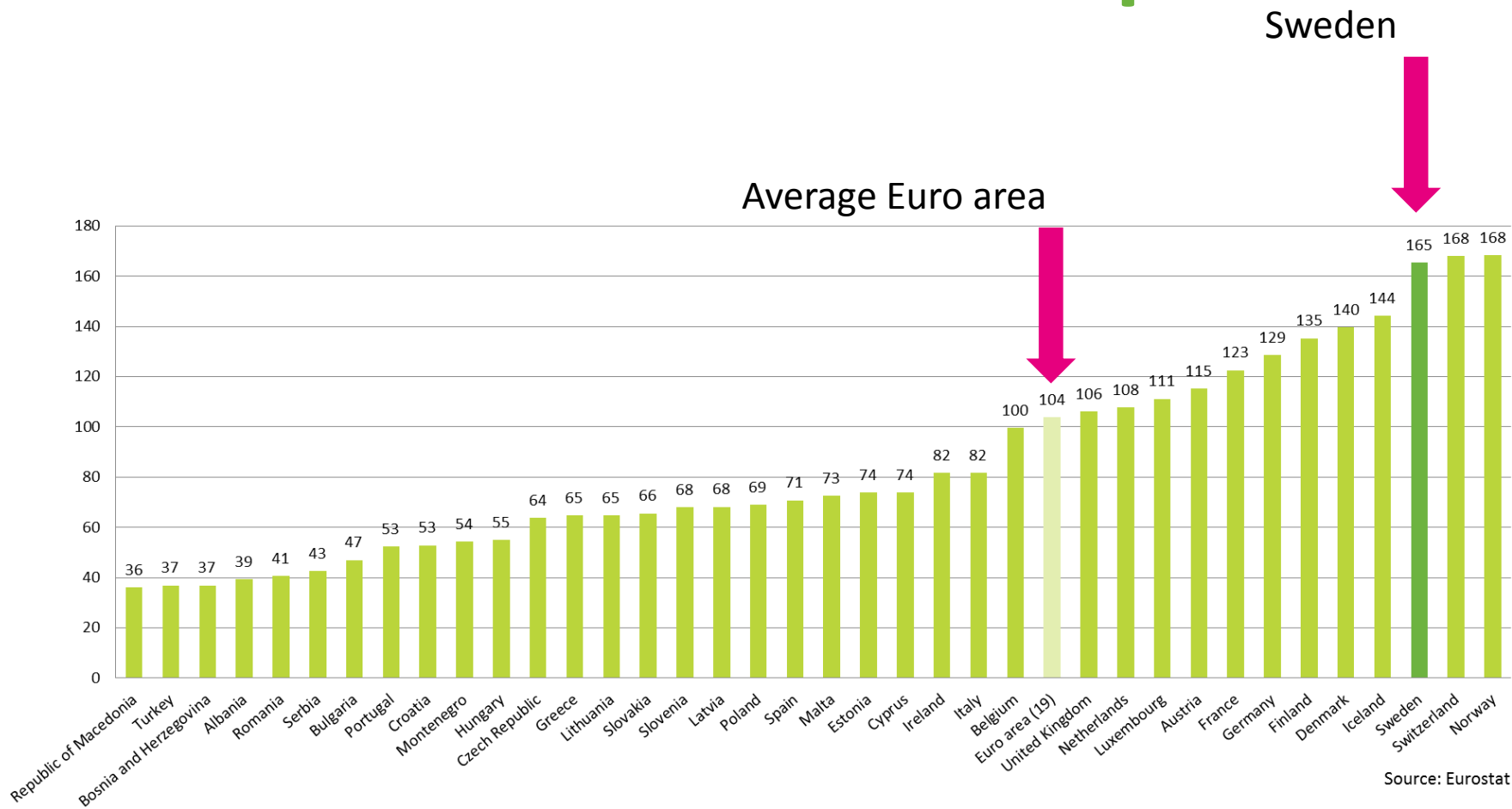
Market domination

75 % of the largest 30
construction companies:

- NCC
- SKANSKA
- PEAB
- JM



Construction Prices in Europe





WHAT IS PUBLIC HOUSING IN SWEDEN

Some numbers, SABO members

1. Number of member companies:

300

2. Number of apartments managed:

800 000

3. Market share in Sweden:

18%

4. They complete 9000 dwellings 2016

9000

5. Value of new construction 2016:

1,6
Billion €

6. Value of refurbish 2016:

1,8
Billion €

Need to know

Owned by the municipalities

1. Tool to manage responsibility for housing
2. Politically appointed board of directors
3. Public procurement act, LOU

How they do business

- Public procurements
- General contractors, “Totalentreprenad”, one stop shop
- Long term facility managers > 50 years
- Local contactors, until now

The SABO model for affordable housing

3 Framework procurements

Kombohus Bas



Kombohus Plus



Kombohus Mini



Turnkey ready
-25 %

Status

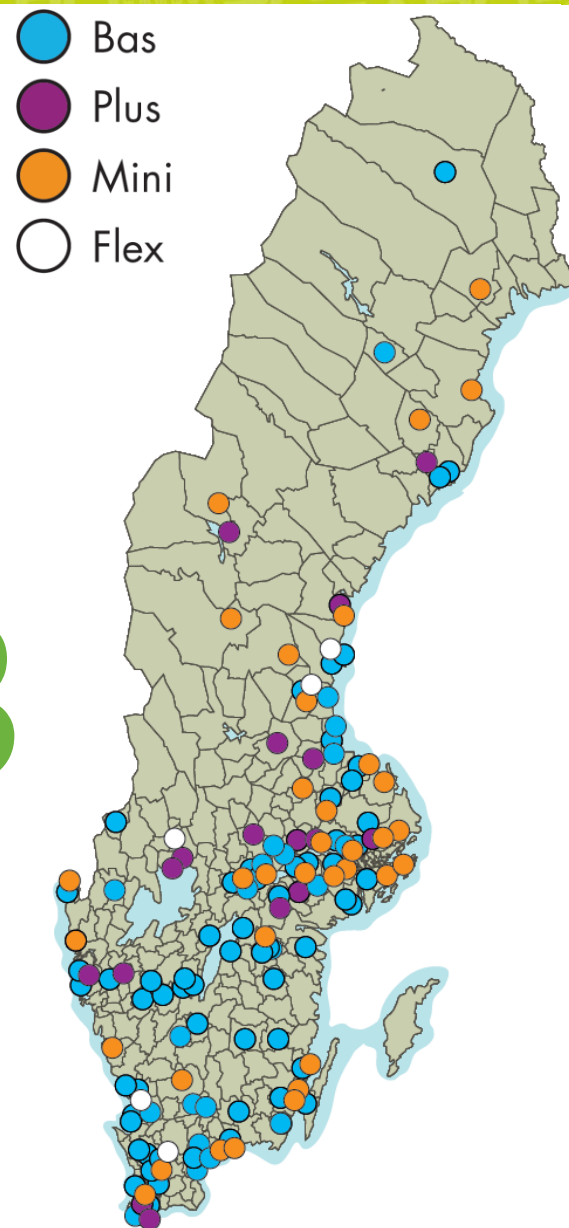
- **8 200** apartments

- Bas, **2 700** apartments

- Plus, **2 000** apartments

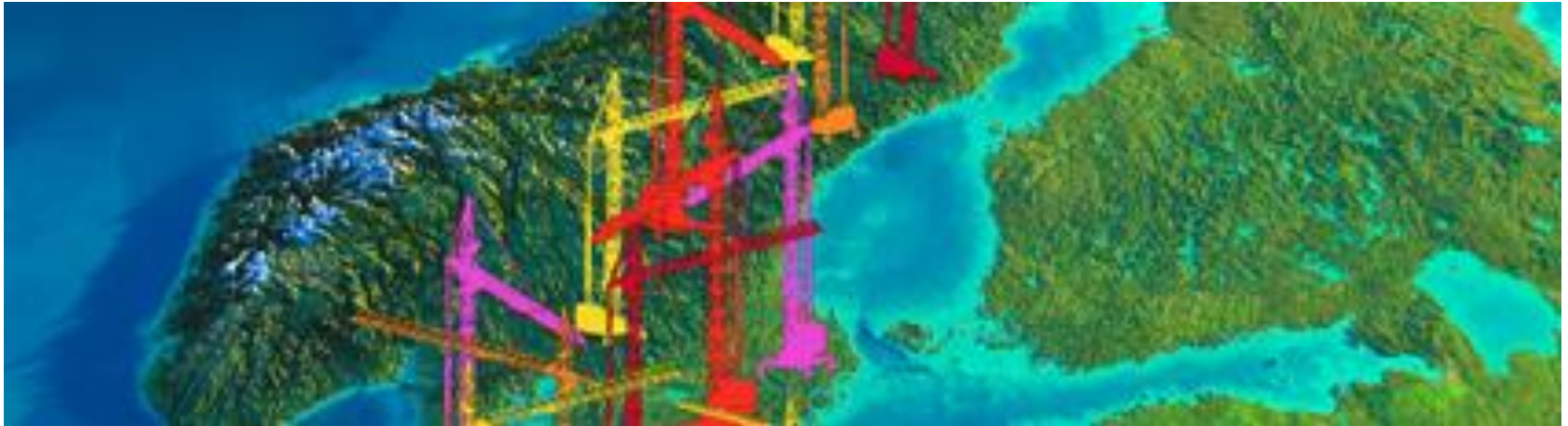
- Mini, **3 200** apartments

1/3



One way to enter Swedish market

Kombohus Flex



1. Functional procurement
2. Turnkey ready dwellings
3. Foreign contractors

Kombohus Flex – need to know



1. Public procurement act (LOU)
2. Recurrent demands ~90 % - SABO controlled
3. Project specific demands ~10 % - Member controlled
4. Evaluation 65 % price & 35 % quality
5. Compared to a reference house, quality 7(10)
6. Compete with your turnkey ready product

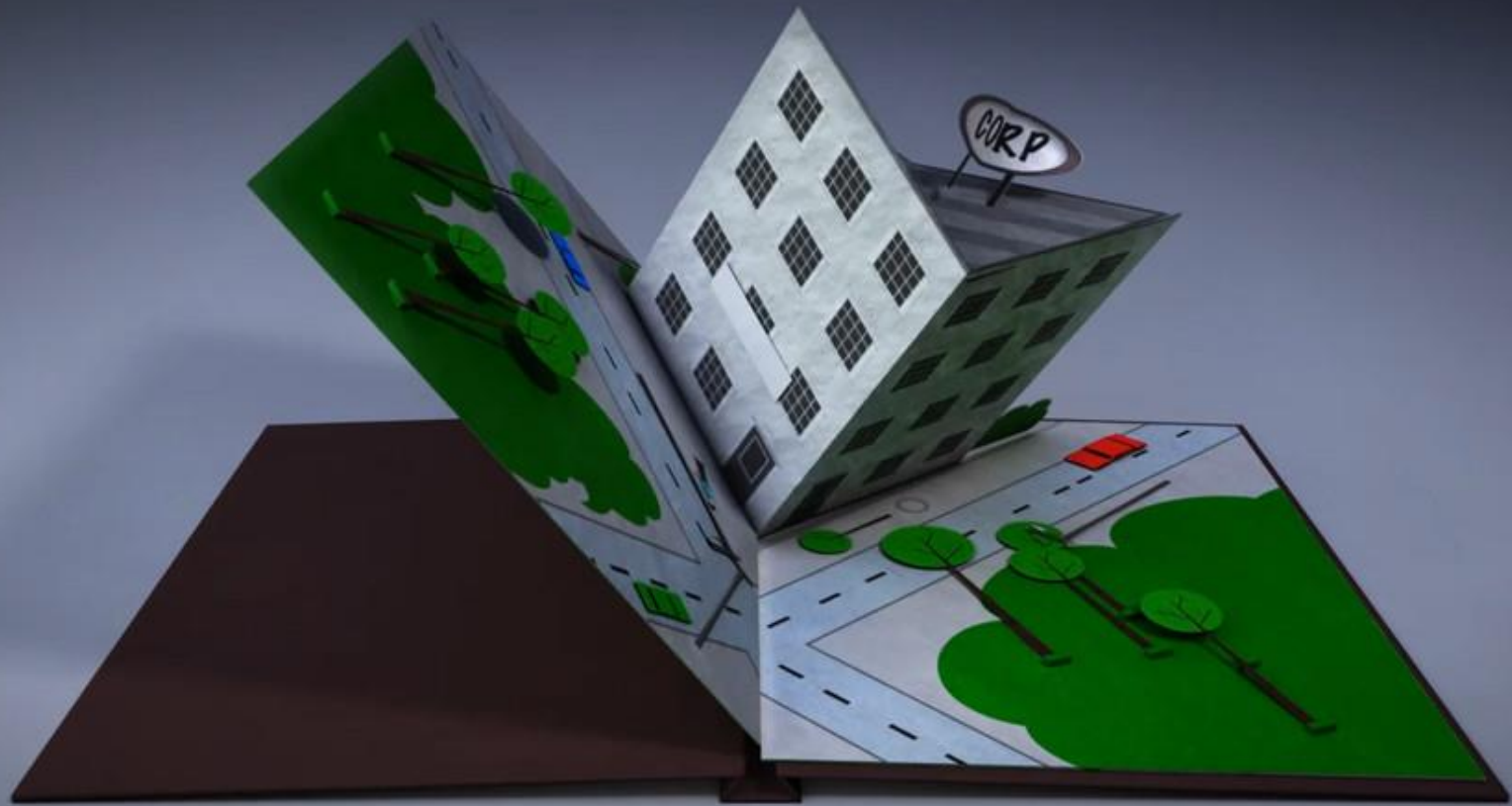
First reference house



Risk - Reward

- Risk
 - Not winning, cost of tender
- Reward
 - Winning one procurement
 - Winning more procurements
 - Simpler tender process every time
 - And...

Reference in the Flex- catalogue



What can be procured in Flex?

Bas, 2-3 r&k



Plus, 1-4, tower block



Mini, 1-2, space efficient



Dwellings for elderly



Houses at noise places



Complete blocks



Since February & forward

- 15 procurements - 350 apartments
- Flex + Plus + Mini
 - ➡ 10-15 % of total construction, SABO members

Steps in entering the system

1. Study already made procurements within Kombohouse Flex.
2. Study the Swedish market in referents to architecture/standards/quality
3. Choose a product that you have built, to compete with
4. Validate the product to Swedish standards & regulations
5. Adjust product according to validation
6. Prepare tender with help from .4
7. Compete in upcoming procurement

Bellman ▶
Fredman
Ulla
Winblad
Klara
Reception ▶

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Thanks!

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