

**Sweden-Stockholm: Pension investment services**  
**OJ S 15/2023 20/01/2023**  
**Contract award notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: SJUNDE AP-FONDEN  
National registration number: 802406-2302  
Postal address: Box 100  
Town: STOCKHOLM  
NUTS code: SE11 Stockholm  
Postal code: 10121  
Country: Sweden  
Contact person: Johan Johansson  
E-mail: [johan.johansson@ap7.se](mailto:johan.johansson@ap7.se)  
**Internet address(es):**  
Main address: <http://www.ap7.se>

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

Regional or local authority

**I.5. Main activity**

General public services

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**Section II: Object**

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

**II.1.1. Title**

Investment Management Services: "Global Equity Passive"  
Reference number: AP7 2022/15

**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.  
More precisely, AP7 will award two (2) to four (4) discretionary investment management mandates that will manage global equities according to a passive index philosophy and investment process with a total volume of approx SEK 700 billion. All information is provided in the procurement guidelines.

**II.1.6.**

## **Information about lots**

This contract is divided into lots: no

### **II.1.7. Total value of the procurement**

Value excluding VAT: 1,00 SEK

## **II.2. Description**

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

NUTS code: SE11 Stockholm

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

AP7 issues an invitation to tender for an Investment Management Agreement.

More precisely, AP7 will award two (2) to four (4) discretionary investment management mandates that will manage global equities according to a passive index philosophy and investment process with a total volume of approx SEK 700 billion. All information is provided in the procurement guidelines.

### **II.2.5. Award criteria**

Quality criterion - Name: Quality of services / Weighting: 40%

Quality criterion - Name: Processes / Weighting: 30%

Price - Weighting: 30%

### **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 IV: Procedure**

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

The procurement is covered by the Government Procurement Agreement: yes

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

#### **IV.2.1. Previous publication concerning this procedure**

Notice number in the OJ S: [2022/S 040-102439](#)

#### **IV.2.8. Information about termination of dynamic purchasing system**

#### **IV.2.9. Information about termination of call for competition in the form of a prior information notice**

## Section V: Award of contract

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A contract/lot is awarded: yes

### V.2. Award of contract

#### V.2.1. Date of conclusion of the contract

12/12/2022

#### V.2.2. Information about tenders

Number of tenders received: 12

The contract has been awarded to a group of economic operators: no

#### V.2.3. Name and address of the contractor

Official name: Blackrock Investment Management (Uk) Limited, Stockholm Fil

National registration number: 516404-1500

Postal address: Norrlandsgatan 16 1

Town: STOCKHOLM

NUTS code: SE Sverige

Postal code: 11143

Country: Sweden

E-mail: [jon.valdelin@blackrock.com](mailto:jon.valdelin@blackrock.com)

The contractor is an SME: no

#### V.2.4. Information on value of the contract/lot

Total value of the contract/lot: 1,00 SEK

#### V.2.5. Information about subcontracting

## Section V: Award of contract

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A contract/lot is awarded: yes

### V.2. Award of contract

#### V.2.1. Date of conclusion of the contract

12/12/2022

#### V.2.2. Information about tenders

Number of tenders received: 12

The contract has been awarded to a group of economic operators: no

#### V.2.3. Name and address of the contractor

Official name: Northern Trust Asset Management

National registration number: 03929218

Postal address: 50 Bank Street, Canary Wharf

Town: London

NUTS code: UK United Kingdom

Postal code: E145NT

Country: United Kingdom

E-mail: [amlondonrfp@ntrs.com](mailto:amlondonrfp@ntrs.com)

Internet address: <http://www.northerntrust.com>

The contractor is an SME: no

**V.2.4. Information on value of the contract/lot**

Total value of the contract/lot: 1,00 SEK

**V.2.5. Information about subcontracting****Section V: Award of contract**

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A contract/lot is awarded: yes

**V.2. Award of contract****V.2.1. Date of conclusion of the contract**

12/12/2022

**V.2.2. Information about tenders**

Number of tenders received: 12

The contract has been awarded to a group of economic operators: no

**V.2.3. Name and address of the contractor**

Official name: UBS Asset Management

National registration number: 101329561

Postal address: Stockerstrasse 64

Town: Zurich

NUTS code: CH Schweiz / Suisse / Svizzera

Postal code: 8002

Country: Switzerland

E-mail: [anette.delmotte@ubs.com](mailto:anette.delmotte@ubs.com)

Internet address: <http://www.ubs.com>

The contractor is an SME: no

**V.2.4. Information on value of the contract/lot**

Total value of the contract/lot: 1,00 SEK

**V.2.5. Information about subcontracting****Section VI: Complementary information**

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**VI.3. Additional information**

All information is provided in the procurement guidelines.

Mercell notice: <https://opic.com/id/affqqpprnp>

**VI.4. Procedures for review****VI.4.1. Review body**

Official name: Förvaltningsrätten

Town: Stockholm

Country: Sweden

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

16/01/2023