

Belgium-Brussels: Distribution systems of retail investment products across the European Union
OJ S 2/2017 04/01/2017
Contract award notice
Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: European Commission, Directorate-General for Financial Stability, Financial Services and Capital Markets Union

Postal address: SPA2, 07/20

Town: Brussels

NUTS code: BE100 Arr. de Bruxelles-Capitale/Arr. Brussel-Hoofdstad

Postal code: 1049

Country: Belgium

E-mail: ec-fisma-contracts@ec.europa.eu

Internet address(es):

Main address: http://ec.europa.eu/dgs/finance/index_en.htm

I.4. Type of the contracting authority

European institution/agency or international organisation

I.5. Main activity

General public services

Section II: Object

II.1. Scope of the procurement

II.1.1. Title

Distribution systems of retail investment products across the European Union.

Reference number: FISMA/2015/146(04)/C.

II.1.2. Main CPV code

79300000 Market and economic research; polling and statistics

II.1.3. Type of contract

Services

II.1.4. Short description

In the context of the action plan on building a capital markets union, the Commission commits to undertake a comprehensive assessment of European markets for retail investment products, including distribution channels and investment advice. The purpose of this contract is to inform this comprehensive assessment by providing facts and figures on the current features and functioning of European markets for retail investment products.

II.1.6. Information about lots

This contract is divided into lots: no

II.1.7. Total value of the procurement

Value excluding VAT: 500 000,00 EUR

II.2. Description

II.2.2. Additional CPV code(s)

79310000 Market research services, 79330000 Statistical services, 79140000 Legal advisory and information services, 79311400 Economic research services, 79311000 Survey services, 79311410 Economic impact assessment, 79100000 Legal services

II.2.3. Place of performance

NUTS code: 00 Other or Not Specified

Main site or place of performance: The tasks are to be performed at the premises designated by the contractor. A maximum of 4 coordination meetings with the contracting authority will be held in Brussels in the Commission premises.

II.2.4. Description of the procurement

The tasks to be carried out are: a) the mapping of the supply of retail investment products through various distribution channels; b) the analysis of the impact of online distribution of retail investment products on costs and charges and investor protection; c) the analysis of the benefits and risks of investment advice for consumers and the way they perceive it and value it; and d) the analysis of the risks and benefits of the new solutions developed by FinTech companies for retail investment distribution.

II.2.5. Award criteria

Quality criterion - Name: Relevance and breadth of the geographical coverage / Weighting: 30

Quality criterion - Name: Quality and relevance of the proposed methodology / Weighting: 50

Quality criterion - Name: Organisation of the work / Weighting: 10

Quality criterion - Name: Quality control measures / Weighting: 10

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

Section IV: Procedure

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.2.1.

Previous publication concerning this procedure

Notice number in the OJ S: [2016/S 152-274977](#)

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

Contract No: FISMA/2015/146(04)/C1/ST/OP

Title:

Distribution systems of retail investment products across the European Union

A contract/lot is awarded: yes

V.2. Award of contract

V.2.1. Date of conclusion of the contract

19/12/2016

V.2.2. Information about tenders

Number of tenders received: 4

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

V.2.3. Name and address of the contractor

Official name: Deloitte Tax & Consulting

Postal address: 560, rue de Neudorf

Town: Luxembourg

NUTS code: LU Luxembourg

Postal code: 2220

Country: Luxembourg

The contractor is an SME: no

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

Initial estimated total value of the contract/lot: 500 000,00 EUR

Total value of the contract/lot: 449 300,00 EUR

V.2.5. Information about subcontracting

Section VI: Complementary information

VI.3. Additional information

VI.4. Procedures for review

VI.4.1. Review body

Official name: General Court of the Court of Justice of the European Union

Postal address: rue du Fort Niedergrünwald

Town: Luxembourg

Postal code: 2925

Country: Luxembourg

E-mail: generalcourt.registry@curia.europa.eu

Telephone: +352 4303-1

Fax: +352 4303-2100

Internet address: <http://curia.europa.eu/>

VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

Within 2 months of the notification to the plaintiff, or, in the absence thereof, of the day on which it came to the knowledge. A complaint to the European Ombudsman does not have as an effect either to suspend or to open a new period for lodging appeals.

VI.5. Date of dispatch of this notice

23/12/2016