

Belgium-Brussels: Study on the feasibility of a European personal pensions framework
OJ S 186/2016 27/09/2016
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

Study on the feasibility of a European personal pensions framework.

Reference number: FISMA/2015/146(02)/D.

II.1.2. Main CPV code

66500000 Insurance and pension services

II.1.3. Type of contract

Services

II.1.4. Short description

This study aims at mapping the tax regimes applicable to personal pensions products within the 28 EU Member States. In addition, the study should analyse the feasibility of implementing a policy framework to foster simple, efficient and competitive personal pensions within the EU.

II.1.6. Information about lots

This contract is divided into lots: no

II.1.7.

Total value of the procurement

Value excluding VAT: 494 466,00 EUR

II.2. Description

II.2.2. Additional CPV code(s)

66520000 Pension services, 66521000 Individual pension services, 66523000 Pension fund consultancy services, 79221000 Tax consultancy services, 79110000 Legal advisory and representation 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 6 coordination meetings with the contracting authority will be held in Brussels.

II.2.4. Description of the procurement

The study should describe the tax requirements applicable to personal pension products within all 28 Member States. In addition, the study should identify the 5 most successful personal pension products. For each of the 5 identified reference personal pension products in the Member States in the sample, the study should look at a number of product features such as investment strategy, return, outpayments, fees, time horizon.

Furthermore, the study should conduct a feasibility analysis of a possible European personal pensions framework to foster simple, efficient and competitive personal pensions within the EU. The outcome of this analysis should assist the European Commission in assessing the feasibility of a European personal pensions framework.

II.2.5. Award criteria

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

Quality criterion - Name: Organisation of the work / Weighting: 30

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

Quality criterion - Name: Geographical coverage / 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 102-180985](#)

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(2)/D4/ST/OP

Title:

Study on the feasibility of a European personal pensions framework

A contract/lot is awarded: yes

V.2. Award of contract

V.2.1. Date of conclusion of the contract

14/09/2016

V.2.2. Information about tenders

Number of tenders received: 1

The contract has been awarded to a group of economic operators: yes

V.2.3. Name and address of the contractor

Official name: Ernst & Young Société d'Avocats

Postal address: 1-2 place des Saisons, Paris La Défense 1

Town: Courbevoie

NUTS code: FR France

Postal code: 92400

Country: France

The contractor is an SME: no

V.2.3. Name and address of the contractor

Official name: Ernst & Young Actuaire-Conseils

Postal address: 1-2 place des Saisons, Paris La Défense 1

Town: Courbevoie

NUTS code: FR France

Postal code: 92400

Country: France

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: 494 466,00 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.5. Date of dispatch of this notice

15/09/2016