

**Belgium-Brussels: Feasibility Study for the Creation of a CMU Equity Market Index Family**

OJ S 247/2018 22/12/2018

Contract notice

Services

**Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

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

Postal address: SPA2, 07/029

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](mailto:ec-fisma-contracts@ec.europa.eu)

**Internet address(es):**

Main address: [https://ec.europa.eu/info/departments/financial-stability-financial-services-and-capital-markets-union\\_en](https://ec.europa.eu/info/departments/financial-stability-financial-services-and-capital-markets-union_en)

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4319>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4319>

Tenders or requests to participate must be submitted to the abovementioned address

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

European institution/agency or international organisation

**I.5. Main activity**

General public services

**Section II: Object**

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**II.1. Scope of the procurement****II.1.1. Title**

Feasibility Study for the Creation of a CMU Equity Market Index Family

Reference number: FISMA/2018/087/E

**II.1.2. Main CPV code**

79314000 Feasibility study

**II.1.3. Type of contract**

Services

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

The aim of the contract is to prepare a study on the feasibility of creating a CMU index family to support capital markets development in accordance with the CMU Action Plan.

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

Value excluding VAT: 350 000,00 EUR

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

This contract is divided into lots: no

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

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

79130000 Legal documentation and certification services, 79311000 Survey services, 79311100 Survey design services, 79311200 Survey conduction services, 79311300 Survey analysis services, 79311400 Economic research services, 79311410 Economic impact assessment

#### **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 3 coordination meetings with the contractor will be held in Brussels.

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

The purpose of the contract is to develop the concept of the index setup – with the definition of the investible universe, the set of inclusion criteria and weighting – and discuss the structural, methodological and operational issues related to the index family. The study should provide an overview of the market and conceptual framework for the CMU Index Family, describing the supply and demand side, as well as the impact of the regulatory environment. The study should also assess the market potential of the new CMU Index Family.

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

Criteria below

Quality criterion - Name: Overview of the market and conceptual framework for the CMU Index Family / Weighting: 40

Quality criterion - Name: Assessment of the market potential of the new CMU Index Family / Weighting: 30

Quality criterion - Name: Organisation of the work / Weighting: 15

Quality criterion - Name: Quality control measures / Weighting: 15

Price - Weighting: 30

#### **II.2.6. Estimated value**

Value excluding VAT: 350 000,00 EUR

#### **II.2.7. Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months: 12

This contract is subject to renewal: no

#### **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**

See procurement documents.

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

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### **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:  
See procurement documents.

#### **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**

See procurement documents and, in particular, the draft service contract.

#### **III.2.3. Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

## **Section IV: Procedure**

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### **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.2.2. Time limit for receipt of tenders or requests to participate**

Date: 08/02/2019 Local time: 23:00

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

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

Bulgarian, Czech, Danish, German, Greek, English, Spanish, Estonian, Finnish, French, Irish, Croatian, Hungarian, Italian, Lithuanian, Latvian, Maltese, Dutch, Polish, Portuguese, Romanian, Slovak, Slovenian, Swedish

#### **IV.2.6. Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 9 (from the date stated for receipt of tender)

#### **IV.2.7. Conditions for opening of tenders**

Date: 12/02/2019 Local time: 14:00

Place:

European Commission, Directorate-General for Financial Stability, Financial Services and Capital Market Union premises, meeting room 06/A030, Rue de SPA 2, 1000 Brussels, BELGIUM.

Information about authorised persons and opening procedure: A maximum of 2 representatives per tender may attend the opening session. For organisational and security reasons the tenderer must provide the full name, date of birth, nationality and ID or passport number of the representatives at least 2 working days in advance to: EC-FISMA-Contracts@ec.europa.eu.

### **Section VI: Complementary information**

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

This is a recurrent procurement: no

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

See procurement documents.

#### **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 Luxembourg

Country: Luxembourg

E-mail: [generalcourt.registry@curia.europa.eu](mailto: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 given to the plaintiff or, in the absence thereof, from the day when it came to knowledge.

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

18/12/2018