

# EU Market update by C4P

May 2018

## Looking forward

What is open to bid for now

Opportunity of the month - [SW in Service Mode for DIGIT](#)

What is coming up (and you should start working on now)

## Looking back

Y2D results

Company of the month - [ICF Mostra](#)

## Analysis of the month

[EU Comms](#): Artificial Intelligence to track this market

## C4P news

Superpowers of procurement data

# Looking forward

121 open opportunities

17 EU countries

Main Sectors: Comms,  
Consulting, ICT

C4P predicts **strongest  
contenders** for open  
opportunities

**++€500Mio** to be re-  
procured in 2018

# Overview of open opportunities

## As reported in the C4P Platform

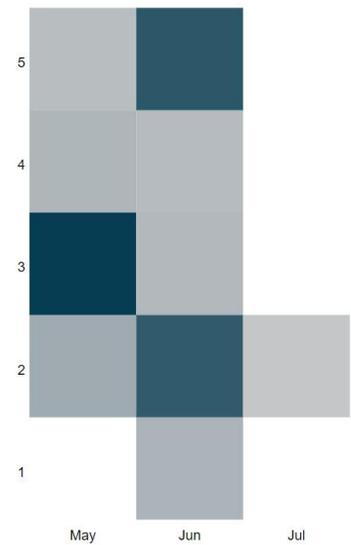


Reset All  
 Select a Date:

Focus on what is coming up in the next 2 months.  
 Short-term pipeline of opportunities that are already published.

[See opportunity](#)

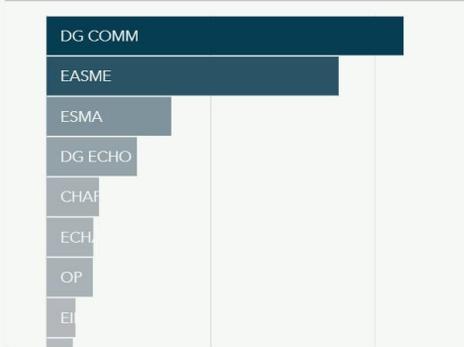
Calendar of Opportunities (week)



Map of Buyers



Buyers



Service Areas



List of open opportunities

Show  entries   Search:

| Year | Title  | Buyer   | Submission date | Lot Value   | Date published |
|------|--|---------|-----------------|-------------|----------------|
| 2018 | Inter-institutional single FWC for the provision of support for the monitoring of LIFE projects (action grants and operating grants) communication about the LIFE programme and other related activities | EASME   | 2018-06-29      | €80,000,000 | 2018-05-05     |
| 2018 | Provision of Audiovisual Production Services, including Graphics, Animation, Media Applications, and Distribution via Multiple Channels - PO/2018-02/A4  | DG COMM | 2018-06-08      | €80,000,000 | 2018-04-05     |
| 2018 | ICT Consultancy  | ESMA    | 2018-05-14      | €38,000,000 | 2018-04-19     |
| 2018 | Single Framework Contract for the provision of VSat Services (Lot 1) and Mobile Satellite Services (Lot 2) for DG ECHO/Provision of VSat Services  | DG ECHO | 2018-05-14      | €16,800,000 | 2018-04-07     |
| 2018 | Framework Contract with reopening of competition for the organisation of coordinated activities on consumer product safety in th EU and EEA/EFTA countries   | CHAFEA  | 2018-06-28      | €15,000,000 | 2018-04-13     |
| 2018 | Framework Service Contract for the provision of IT services for the IT Applications of the European Chemicals Agency (ECHA) related to the REACH Regulation  | ECHA    | 2018-05-17      | €14,252,000 | 2018-03-31     |
| 2018 | Audiovisual Coverage of EU Current Affairs - PO/2018-05/A4/Europe  | DG COMM | 2018-05-16      | €13,400,000 | 2018-03-28     |
| 2018 | AO 10666 "OP Portal Managed Services"  | OP      | 2018-06-13      | €9,000,000  | 2018-05-04     |

# Main open opportunities per Sector

## With strongest contenders as predicted by C4P



| Sector     | Buyer    | Title  | Deadline | Budget | Contenders                               |
|------------|----------|--|----------|--------|--|
| ICT        | ESMA     | ICT Consultancy (re-published)   | 14 May   | 38     | Atos, Steria, Staffing agencies          |
|            | OP       | Portal Managed Services  | 13 June  | 9      | Arhs, Intrasoft, Siveco                  |
|            | DG DIGIT | Software development in service mode   | 5 June   | 30     | Atos, Intrasoft, Everis, Arhs, Accenture |
| Policy     | CHAFEA   | Organisation of coordinated activities on consumer product safety in the EU and EEA/EFTA countries                         | 28 June  | 15     | Deloitte, McKinsey, PHE                  |
|            | DG RTD   | Open Research Europe   | 18 May   | 6.4    | Everis, Sogeti                           |
|            | EASME    | Monitoring Digital Transformation and Key Enabling Technologies  | 4 May    | 4      | Technopolis, PwC, CARSA                  |
| Consulting | DG DIGIT | Project Monitoring and Quality Assurance for Software Development in service mode  | 5 June   | 3      | CGI, EY, Wavestone, PwC                  |
|            | ECMWF    | Outsourced Procurement Services  | 17 May   | -      | Trowers & Hamlins, PwC                   |
|            | EMSA     | Assessment of candidates to managerial functions   | 9 May    | 1.5    | The Performance Solution, PwC            |
| Comms      | DG COMM  | Audiovisual Production Services, including Graphics, Animation, Media Applications, and Distribution via Multiple Channels | 8 June   | 80     | Videohouse, ALL TV                       |
|            | SG SCIC  | Conference assistant services  | 8 May    | 0.6    | GL Events, Cecoforma, Team Work          |

# Opportunity of the month: Software development in service mode

## Market leaders in ICT delivered offsite



Reset All

**Focus on the Market Segments.**  
Learn who buys and where.  
See each segment's leaders, and get insights about their portfolio.

1 Service Areas & 1 sub-Service  
Areas of €954M, with 9 Buyers & 40 Suppliers

5 selected

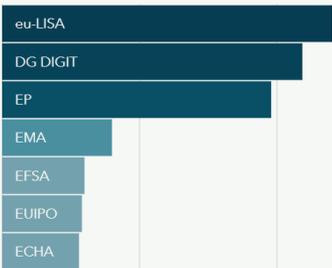
Service Areas



sub-Service Areas



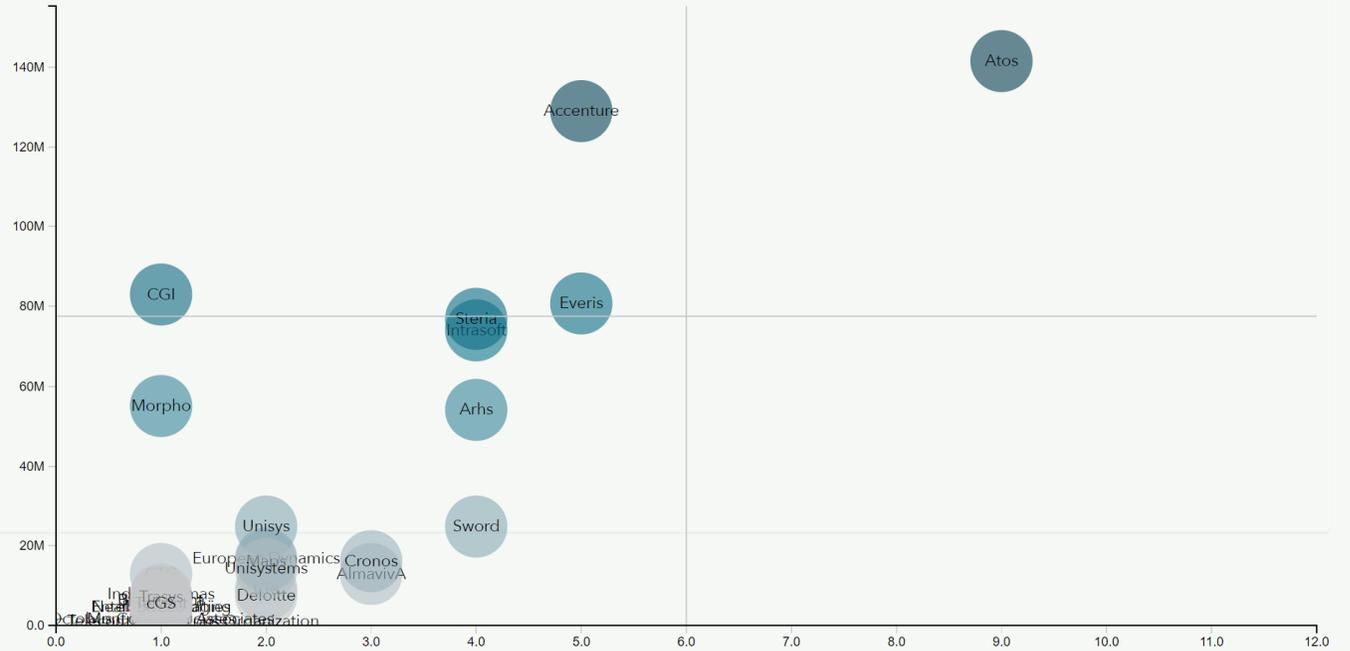
Buyers



Map of Buyers



Suppliers



Opportunities

Show 25 entries

Search:

| Title  | Buyer    | Year | Lot Value    | Consortium Composition  |
|--|----------|------|--------------|---|
| DIGIT/R2/PO/2013/029 - External service provision for development, studies and support for information systems (ESP-DESIS III)./Time and means IS developments | DG DIGIT | 2014 | €451,834,516 | 1. Arhs - Cegeka - KPMG - Ordina - Sword<br>2. Trasy - Atos - EII - Everis - Fujitsu - Intrasoft - Sogeti - Unisys<br>3. Cronos - Accenture - CRI - Indra Sistemas - Reply<br>4. European Dynamics - Almaviva - Telvent |

# Main opportunities expected in the coming months

## That you should start working on now

| Sector     | Buyer    | Title   | Deadline | Budget | Incumbents  |
|------------|----------|---|----------|--------|---|
| ICT        | CJEU     | Maintenance and development of IT systems   | Q4       | 47     | Arhs, CGI, Everis   |
|            | DG TAXUD | Intra muros' consultancy services for European Union IT systems and applications in the customs, excise and taxation areas (TIMEA2)   | Q3       | 41     | Trasys - Unisys   |
|            | EEAS     | Information systems development lifecycle services  | Q4       | 35     | Atos  |
| Policy     | DG ENV   | Framework contract on economic analysis of environmental and resource efficiency policies   | Q4       | 14     | COWI - Ecorys - IEEP - Trinomics                                |
|            | DG REGIO | Studies, reports and impact assessments   | Q2       | 20     | Multiple across Lots, indicatively: PwC, EY, WIIW, Rambøll, ... |
| Consulting | DG ENV   | Framework contract for monitoring of LIFE projects (action grants and operating grants), communication about the LIFE programme and other linked activities.  | Q2       | 64     | NEEMO (AEIDL, IDOM, Particip,...)                               |
|            | EUIPO    | Programme and project management and technical consultancy in the field of information technology.  | Q2       | 24     | Unisys, European Dynamics, PwC                                  |
|            | DG REGIO | Technical assistance for the assessment, monitoring and closure by the Commission of projects receiving assistance from the ERDF, the CF and the IPA in relation to the associated thematic or sectoral issues and audit of these projects by the ECA | Q2       | 17     | PwC, EY, KPMG, COWI, ...  |
| Comms      | DG JUST  | Support the design and implementation of communication activities relating mainly but not exclusively to the area of EU justice   | Q3       | 21     | Tipik   |
|            | DG HOME  | Organisation of events related mainly but not exclusively to the area of EU home affairs  | Q3       | 20     | ProPager  |

# Looking back

€1.2Bio awarded so far this  
year

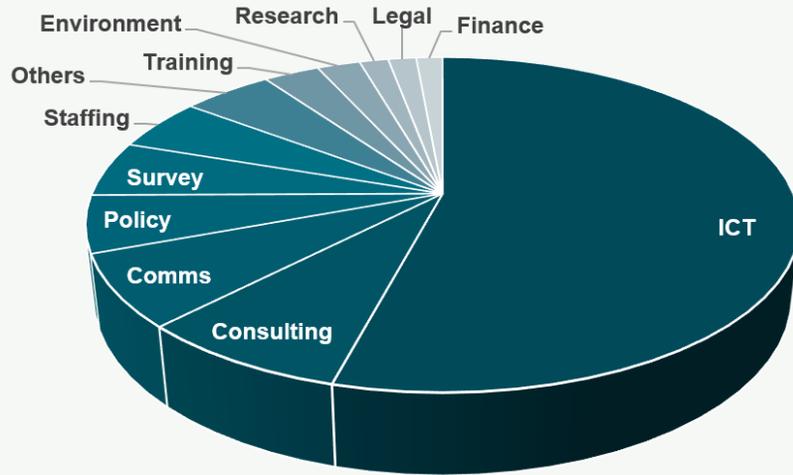
50% procured in ICT services

DG DIGIT, ECB have  
procured the most

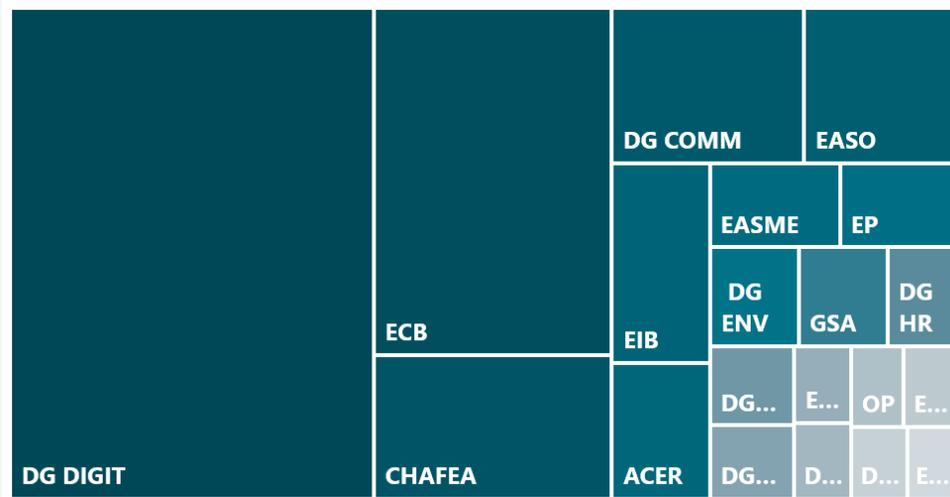
Company of the month: ICF  
Mostra

# Y2D results - May 18

## Sectors



## EU Institutions



## Companies

### ICT

1. Unisys
2. Microsoft ↗
3. Deloitte

### Consulting

1. IDC
2. Gartner
3. Deloitte

### Policy

1. Deloitte
2. Eftheia ↗
3. ICF Consulting ↗

### Legal

1. DLA Piper
2. PwC
3. KSB

### Tax

1. PwC
2. Law Square
3. Deloitte

### Comms

1. ICF Mostra
2. Team Work
3. Pomilio Blumm ↗

### Environment

1. Ricardo
2. AMEC
3. IIASA

### Staffing

1. Atlas
2. HCL
3. Randstad

### Finance

1. McKinsey
2. PwC
3. KPMG

Company of the month:

**ICF Mostra**

Market Leader in EU Communications

# ICF Mostra

## EU services market footprint



Enter Suppliers for Benchmarking

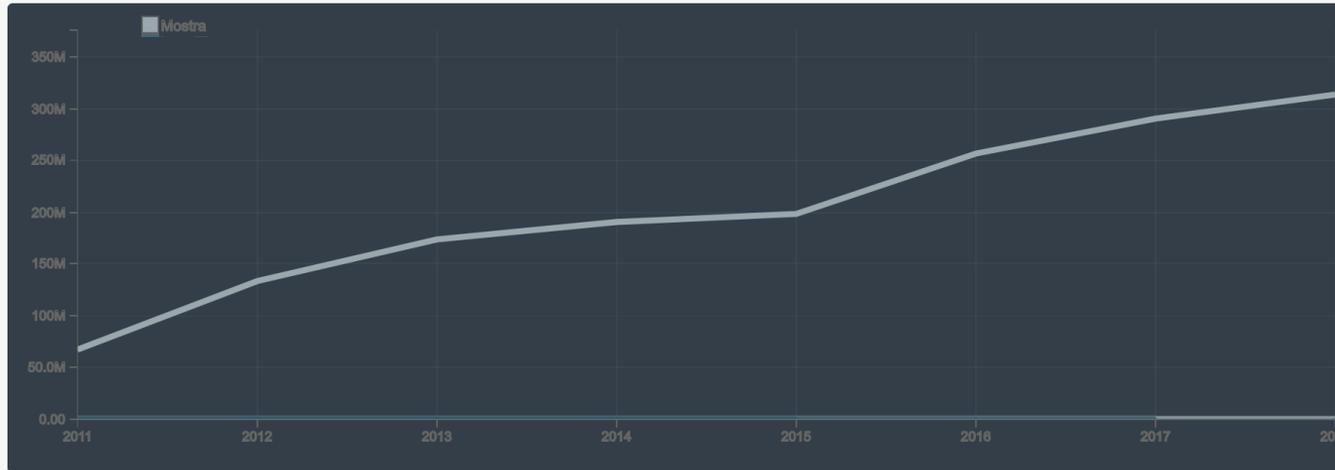
Select 1st Company

Mostra

Service Area

Select all

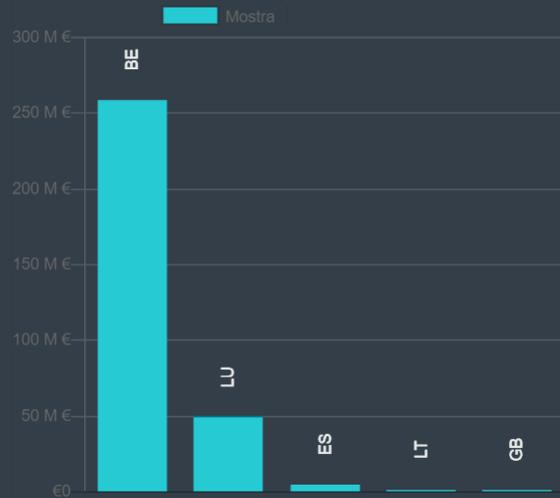
- Comms
- Copernicus
- Environment
- ICT
- Media



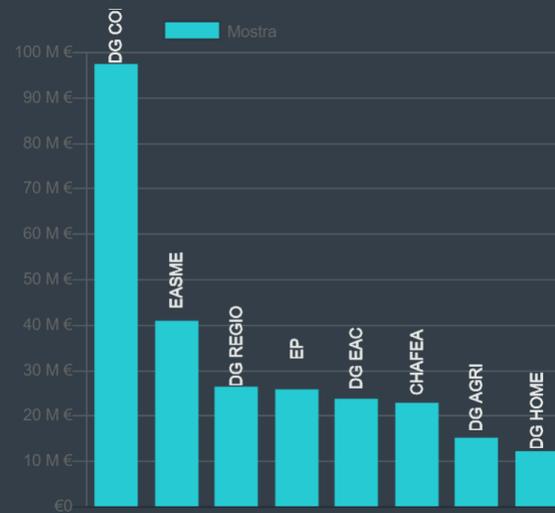
In Numbers

|                 |               |
|-----------------|---------------|
| Supplier        | <b>Mostra</b> |
| Revenues        | <b>310M €</b> |
| # Contracts     | <b>40</b>     |
| # Clients       | <b>24</b>     |
| Rating          | <b>B-</b>     |
| # Service Areas | <b>8</b>      |

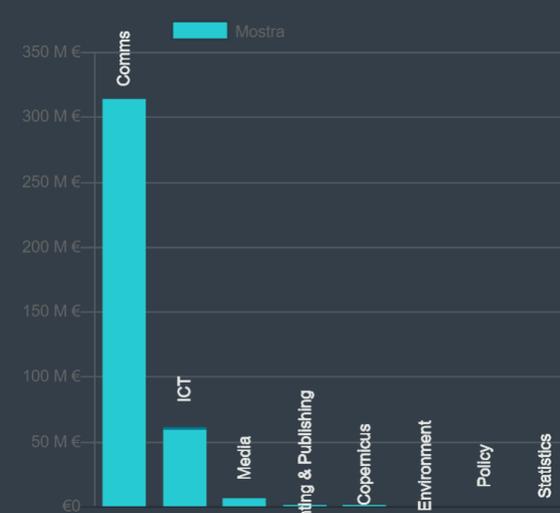
Countries



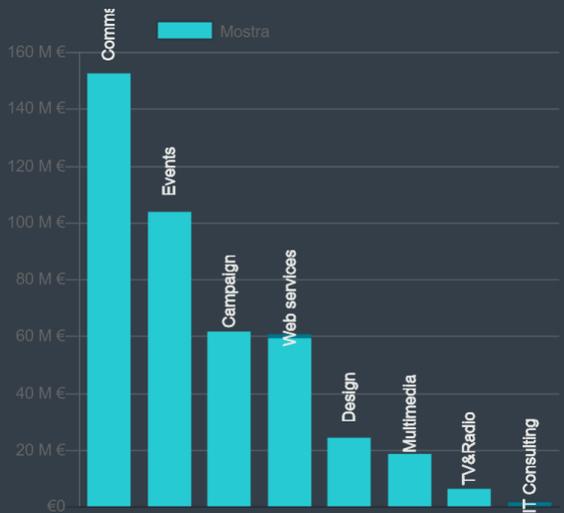
Clients



Service Areas



Sub-Services



# ICF Mostra

## EU services market footprint

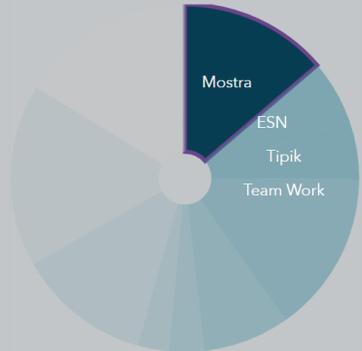


Reset All

### Focus on the Suppliers.

What they are good at, their presence at their clients, their momentum and their business partners.

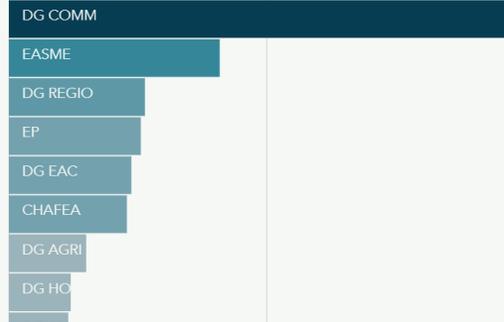
#### Select a Supplier



#### Business Methods

€313M Revenues  
 # of Contracts: 40  
 €7.83M per Contract  
 Present in 24 Clients  
 Active in 8 Service Areas  
 68.8% share of Contracts  
 93.5% share in Consortium

#### Client Base



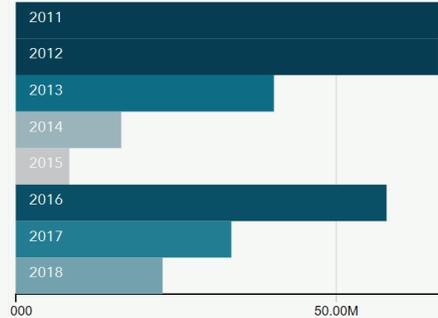
#### Service Areas



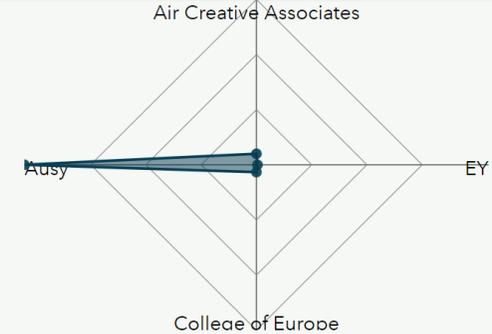
#### Geographical Focus



#### Momentum



#### Business Partners of Mostra in 40 contracts



#### List of Opportunities

Show 10 entries

Search:

| Year | Contract/Lot Title   | Buyer   | Supplier Value |
|------|--|---------|----------------|
| 2017 | Digital communication services - PO/2016-20/A5./Digital communication services - PO/2016-20/A5 | DG COMM | €31,633,012    |

# Analysis of the month - EU Communications

**€3Bio** procured for  
Communication services over the  
past 7 years

**87%** of services are procured by  
EU Institutions in BeLux

**Artificial Intelligence** is  
required to track this market

**ICF Mostra, ESN and Tipik**  
are the market leaders

### Problem

## Tracking the EU Comms market

EUs have used no less than **150 different CPV codes** to classify EU Communications projects on TED.eu.

Some **obvious**: "*Event services*"

Some **generic**: "*Business and management consultancy and related services*"

And some **not very relevant**: "*Software programming and consultancy services*"

So, **how can you:**

**Track** this market?

Assess your **real potential** in it?

Identify its main **buyers**?

Find potential **collaborators**?

Build a realistic and accurate **pipeline**?

### C4P Solution



## Artificial Intelligence

C4P has developed a proprietary ML solution that classifies opportunities according to their **real nature**, instead of their CPV code.

So our clients have a **complete and accurate market view** and an embedded **market radar**, that guarantees that they get all the intelligence they need for this €3Billion worth market.

# EU Communications

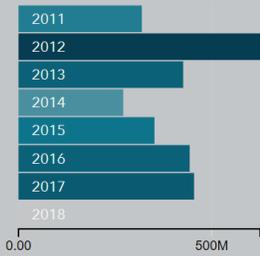
## Market overview by C4P



Reset All

**A macroscopic view of the Industry.**  
The Buyers, the Suppliers and how they are linked.  
A view across geographies and time.

Year

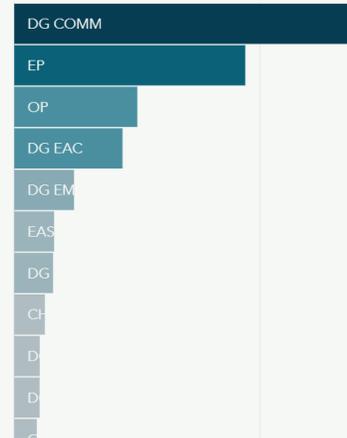


An Industry of **€2.96G**.  
1038 Opportunities in 21 Areas.  
85 Buyers in 28 countries.  
733 Suppliers from 48 countries.  
€30M per Buyer.  
€4.04M per Supplier.  
8.62 Suppliers to Buyers ratio.  
5.10 Offers per Opportunity.

Service Areas



Buyers



Map of Buyers



Map of Suppliers



Buyers (EU Institutions) - Suppliers (Service Providers)



C4P news

# Superpowers of procurement data

30-31 May 2018, Brussels

# Superpowers of procurement data at C4P

## About the event

Organised by the **Bulgarian Presidency** of the Council of the European Union and the **Publications Office** of the European Union.

The event is dedicated to the **importance of publishing public procurement data** and its **impact for businesses and policies**.

The event will take place in **30/31 May 2018**, in **Brussels**.

More info and registrations at:

<https://publications.europa.eu/en/web/teevent2018/home>

## C4P at Superpowers of procurement data

We are excited to participate in this event, and discuss about **Artificial Intelligence**.

We will go through the **different stages of AI** in analogy to Human Intelligence, and analyse **which superpower** of procurement data can be revealed at each one.

Hint: C4P is now entering the childhood phase of its AI journey.

# More intelligence?

## Analyst reports

Subscribe to our analyst reports to stay up to date about the EU market:

[www.c4p.io/newsletter](http://www.c4p.io/newsletter)

## EU Comms analysis

Interested in the full version of our analysis of the EU Communications market?

Send us a message at [andreas@c4p.io](mailto:andreas@c4p.io)

## C4P Platform

Interested in market analysis, competitive intelligence and evidence-based business development?

Request a demo of the C4P Platform at [platform@c4p.io](mailto:platform@c4p.io)

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