

EUROPEAN COMMISSION

DIRECTORATE-GENERAL “EMPLOYMENT AND SOCIAL AFFAIRS”

' A thematic study using transnational comparisons to analyse and identify cultural policies and programmes that contribute to preventing and reducing poverty and social exclusion '

VT/2002/81

TERMS OF REFERENCE

1. Context

The Lisbon European Council in March 2000 committed the European Union to making "a decisive impact on the eradication of poverty and social exclusion". It concluded that "policies for combating social exclusion should be based on an Open Method of Co-ordination combining national action plans and a Commission initiative for co-operation in this field". All Member States drew up their first two year national action plans (NAPs/incl) by June 2001 and a new Community action programme to encourage co-operation between Member States was agreed and came into operation in January 2002. Strand I of the Community action programme provides for the development of thematic studies which will contribute to the understanding of social exclusion, in order to address common issues in connection with policy developments in Member States.

An analysis of the NAPs/incl, the *Joint Report on Social Inclusion* which was adopted at the European Council of Laeken in December 2001, highlighted the need for more attention to be given to the area of access to culture. The *Joint Report* stressed that access to and participation in cultural activity is a core part of human existence. Such participation is important for fostering a positive sense of identity and encouraging and stimulating creativity, self-expression and self-confidence. Involvement in the arts and creative activity is thus a very important tool in the activation and reintegration of those individuals and groups who are most distant from the labour market and who have the lowest levels of participation in society. Community arts projects also can play an important role in the regeneration of local communities and in the work of neighbourhood groups. However, in spite of this, the *Joint Report* also concluded that the issue of access to culture remained underdeveloped in most NAPs/incl and in general Member States did not present coherent plans for fostering the participation of those who are excluded in the creation of culture and in cultural activities. In the light of this it has been decided that the issue of access to culture should be a priority concern for the new Community action programme and hence this call for tenders for a study on policies in relation to access to culture.

2. Objective of the Contract

The goal that this contract is intended to achieve is to assist the development of more coherent and integrated policies in relation to access to culture as part of the further development of Member States' NAPs/incl. It will do this by producing a report which will identify the different ways that participation in and access to cultural activity can help to combat poverty and social exclusion and contribute to promoting social inclusion and will specify the mix of policy approaches that can assist in this regard.

3. Tasks to be Undertaken by the Contracting Party

This study will draw on existing research and data and will compare and contrast policy approaches and outcomes in a representative sample of at least six different Member States in the area of access to culture as well as taking account of international studies and experience in this area and the views of those experiencing poverty and social exclusion. In particular the contracting party will undertake five tasks. These are:

(i) identify the ways in which poor access to and participation in cultural services and activities can deepen and intensify poverty and social exclusion and document which groups and individuals are particularly at risk of inadequate access and why;

(ii) identify the different barriers that prevent those at risk of poverty and social exclusion accessing cultural services and opportunities and expressing their own cultural identity;

(iii) document the contribution that increased access to and participation in cultural activities can make to combating poverty and social exclusion and increasing social inclusion, in particular through enhancing the integration of those individuals and groups who are excluded into society and through contributing to the regeneration of disadvantaged communities;

(iv) analyse and draw conclusions as to the different mix of cultural policies and programmes which are necessary to:

- increase equality of access and remove barriers to participation in cultural activities and programmes by those experiencing poverty and social exclusion;
- enhance the contribution that cultural activities and programmes can make to combating poverty and social exclusion and promoting social inclusion.

(v) test these conclusions by presenting a draft report at a seminar to be held in the Commission's premises (and making use of the Commission's translation services). This would involve policy makers, experts and organisations working in the field of access to culture. The report would then be refined and amended by the consultants in the light of this dialogue.

4. Expertise Required

The contracting party will require:

- a deep knowledge of the nature and causes of poverty and exclusion;
- an extensive knowledge of the European and international literature and data on the links between access to culture and social inclusion;
- a good understanding of the different policies in Member States that enhance or restrict access to culture;
- a proven track record in the field of policy analysis, particularly in relation to poverty and social exclusion and cultural activities.

5. Timetable

It is envisaged that the contract will begin in December 2002 and will be completed by mid September 2003.

6. Reports

As well as the report of the study the contractor will present a draft activity report and then a final report containing:

- a complete description of the work undertaken in the framework of this contract;

- a presentation of the results obtained for the whole of the contract period in accordance with the present terms of reference;
- any comments, suggestions or recommendations considered useful or necessary by the contractor.

The draft final activity report together with two copies ought to be submitted to the Commission at the latest four weeks before the end of the period mentioned in point 5. The final activity report ought to be submitted at the latest two weeks after the Commission has sent its comments or has accepted the draft final activity report.

7. Payment and Standard Contract

Payments will be made on receipt of the corresponding invoices according to the following schedule:

- an interim advance payment of 30% within 60 days from signature of the contract and on receipt of a written request;
- an interim payment of 40% within 60 days from receipt and approval by the Commission of an interim activity report;
- a final payment to cover the balance due under the contract within 60 days from receipt and approval by the Commission of the final report of the study, the final financial report and the final activity report.

All payments will be made in Euro (€).

8. Price

The price sought ought not to exceed €100,000 (including travel and subsistence expenses).

9. Composition of the Partnership or Consortium

If a partnership or consortium is envisaged, its composition ought to be specified and the criteria listed under point 10 ought to be detailed to individual members of the partnership. In addition, one of the consortium members must be designated as lead contractor and must ensure full responsibility towards the Commission as regards both the tender and the future contract - if awarded to them.

10. Selection Criteria

The Commission will verify (in application of Article 29 paragraphs *e* and *f* of Council Directive 92/50/EEC on Public Procurement) that the tenderer has fulfilled his obligations relating to social contributions and taxes. Applicants will be excluded if they fail to submit the following documents:

- a certificate from the social security authorities to the effect that the applicant is up to date with payment of social security contributions;
- a certificate to the effect that the applicant has met all his tax obligations in accordance with the legal provisions of the country in which he is registered.

1. A minimum experience and expertise of five years in the fields of policy research and analysis on issues of poverty and social exclusion, part of which should have been focussed on access to culture, cultural policies and programmes - demonstrated by providing a list of relevant policy analysis and research projects.

2. Details of educational and professional qualifications of the person(s) undertaking the study. The project director will require a deep knowledge in relation to access to culture and participation in cultural activities in Member States and of the different policy approaches being adopted; an extensive knowledge of the European and international literature and data on access to culture and culture participation; a proven track record in the field of policy analysis, particularly in relation to poverty and social exclusion.

3. The consultants/researchers should have no-conflict of interest and be completely independent. A statement of independence should be included in the offer.

4. Sound financial position of the consultant/researchers. Full set of audited financial statements and accounts -balance sheet and profit and loss account for the past three years. Annual budget of the last two years for a semi-public or non-profit organisation

11. Award criteria

The contract will be awarded on the basis of the best value for money, taking into account the following criteria:

- Methodological approach (80%); the depth of understanding of the objectives being pursued by this call for tender and the quality of the analytical and methodological approach proposed. This criteria will be judged on the basis of the work programme and methods of work proposed.
- Timing (20%); the capacity to complete the work well in the time available.
- Price

12. Period of Validity of the Bid

The bidder is required to conform to the terms of the tender which has been submitted for the six months which follow the date of submitting the bid to the Commission.

13. Content and Presentation of the Bid

Content

The bid should include:

- all the information and documents necessary to allow the Commission to appraise the bid on the basis of the selection criteria mentioned under point 10;
- a financial identification form duly completed and signed;
- the proposed price;
- the curriculum vitae of the expert(s);
- the name of the contractor's legal representative (i.e. the person duly authorised to act legally on behalf of the contractor in relation to third parties).

Presentation of the Bids

The bid should:

- be submitted in triplicate (1 original and 2 copies);

- contain all the information requested by the Commission (cf. Points 7, 8 and 9 above);
- be clear and concise;
- be signed by the tenderer's legal representative;
- be delivered according to the requirements set out in the letter of invitation to tender and before the date and time indicated in this letter.