

EUROPEAN COMMISSION

DIRECTORATE-GENERAL “EMPLOYMENT AND SOCIAL AFFAIRS”

'A thematic study using transnational comparisons to analyse and identify what combination of policy responses are most successful in preventing and reducing high levels of child poverty '

VT/2002/76

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 identified both wide variations in the levels of child poverty across Member States and also that the issue of child poverty is a key concern shared by Member States. This is highlighted in the *Joint Inclusion Report* which was adopted at the European Council of Laeken in December 2001. In the light of this it has been decided that the issue of child poverty 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 child poverty.

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 to combat child poverty and exclusion in Member States in the context of the further development of NAPs/incl. It will do this by producing a report which will identify what combination of policies appear to be most successful in reducing and preventing high levels of poverty and social exclusion amongst children.

3. Tasks to be Undertaken by the Contracting Party

Starting with a clear definition and description of the nature and main characteristics of child poverty in Member States and drawing on studies and statistical data that are already available the contracting party will undertake four key tasks. These are:

(i) to identify those indicators which best reflect the multi-dimensional nature of child poverty and take into account the experience and views of children experiencing poverty and those working with them (e.g. NGOs, teachers and social workers) and to use these to document and analyse the differing levels of child poverty and social exclusion amongst all Member States and to help to identify the different risk factors that affect children and how these differ or converge across Member States and for different groups of children;

(ii) to identify the different policies in place in a representative sample of Member States (about 6), but also in other developed economies, to prevent and reduce child poverty and to analyse the extent to which differences in levels of child poverty can be explained by the different policy approaches adopted. This analysis should give particular attention to assessing the effectiveness of work based strategies aimed at assisting families with children at risk of poverty to move into the work force. This will involve identifying how far such policies can be developed, what combinations of

supports are necessary to achieve successful outcomes (e.g. support through tax and welfare systems, child care, transport, training, flexible working, family friendly policies, etc), what are the limitations of such an approach and for which children and families is such an approach most successful and for which least successful and why.

(iii) to draw conclusions as to:

- the combination or package of policies that is necessary to ensure low levels of child poverty and exclusion and to shorten the length of time children are in poverty;
- how best to achieve the effective co-ordination of such policies in order to ensure that they are complementary and reinforcing and to ensure that the issue of child poverty and children's access to their fundamental rights is mainstreamed and integrated across all relevant policy areas;

(iv) to 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 child poverty and exclusion. 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 child poverty and exclusion in Member States and of the different policy approaches being adopted;
- an extensive knowledge of the European and international literature and data on child poverty;
- a proven track record in the field of policy analysis, particularly in relation to poverty and social exclusion.

5. Timetable

It is envisaged that the contract will begin in December 2002 and will be completed by 15th 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. All the reports will have to be written in the English language.

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 child poverty - demonstrated this 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 of the nature and causes of child poverty and exclusion in Member States and of the different policy approaches being adopted; an extensive knowledge of the European and international literature and data on child poverty; 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 11;
- 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.

