

**COMMUNITY ACTION PROGRAMME TO COMBAT SOCIAL EXCLUSION**

CALL FOR TENDERS

**« A THEMATIC STUDY ON POLICY MEASURES CONCERNING  
DISADVANTAGED YOUTH»**

Number VT/2004/040

Period of Performance: 01/12/2004-30/09/2004  
(10 months)

Budget Line 04040202

**TERM OF REFERENCE**

## **1. Specific Context**

The Joint Report on Social Inclusion, based on an analysis of the 2003/2005 National Action Plans on poverty and social exclusion, has put forward the problems of disadvantaged youth as one of the six key priorities. Over the course of the next two years, Member States are urged to give particular attention to: 'Implementing a concerted effort to prevent early school leaving and to promote smooth transition from school to work'. The importance of the issue is also recognised in many of the acceding countries in their 'Joint Assessment Papers on employment policies' and 'Joint Memoranda on Social Inclusion'. This has thus been identified as a priority area for further work under the Community action programme on social exclusion and particularly for a thematic study aimed at supporting Member States in the development of effective policies and programmes in this area.

## **2. Purpose of the Contract**

Disadvantaged youth is, in the context of this study, primarily defined as young people who, because of poor skills or any type of handicap, meet persistent problems in integrating into the first labour market and for that reason are jobless or drift continuously between low-wage, short term jobs. Employment difficulties may be associated with social problems of integration. However, it is important to take into account that those risks are very unequally distributed and highly correlated with other risk factors in the fields of poverty and social exclusion.

The aim of this contract is four fold:

- To identify the socio-economic characteristics of disadvantaged youth in relation to unemployment and low educational attainment;
- To identify, the key problems of the transition of disadvantaged youth from school to work and analyse the main obstacles for their sustainable integration into the first labour market;
- To assess the impact of both inclusion and active labour market policies and their interaction in fighting youth unemployment and the promotion of smooth transition from school/vocational training to work;
- To identify the causes of success or failure of educational reforms, social inclusion and active labour market programmes to support disadvantaged youth.

## **3. Tasks to be performed by the Contractor**

The study will analyse and contrast policy approaches and outcomes in those Member States, Acceding Countries and Candidate Countries that are, according to the harmonised figures from the Labour Force Survey, the most affected by youth unemployment and / or early school leave: Greece, Spain, Italy, Portugal, Finland, United Kingdom; Poland, Slovakia; Bulgaria and Romania. To widen and contrast the debate, one Member State with apprenticeship system, one Scandinavian Country, and one

Central European Acceding Country where transition from school to work has been addressed more successfully, should be added to this list. The study will take account of international studies and experiences in this area.

In particular, the contracting party will undertake the following tasks and will, where appropriate, fully integrate the gender dimension into the work:

- Analyse the impact of the systems of education (using, where appropriate, harmonised surveys such as the PISA study) and vocational training on the transition of disadvantaged youth from school to work;
- Identify the high risk groups among disadvantaged youth in relation to socio-economic background, ethnicity / immigration, and regional disparities;
- Analyse the dominant patterns of transition from school to work of those groups, by referring to the demand side and to the quality of jobs / opportunities for progression, and where appropriate, to the second labour market, 'irregular' work and to the role of the employment of disadvantaged youth in the 'informal sector';
- Assess the effectiveness of policies of education and / or labour market aimed at the sustainable integration of disadvantaged youth into the first labour market;
- Assess for Member States the key elements in fighting youth unemployment and school rupture put forward in the National Action Plans on social inclusion and on employment;
- Identify examples of good practice that might be of interest to other countries, discuss the possibility of their generalisation out of the original context.
- Present the conclusions of this work in a draft report at a seminar to be held in the Commission's premises. This would involve relevant policy makers, experts and social partners and NGOs working in the field of the fight against social exclusion and poverty and with a particular interest and expertise in this area. The report would then be refined and amended by the consultants in the light of this dialogue.

#### **4. Expertise required**

See Annex IV, CVs of experts.

- a deep knowledge of the nature and causes of poverty and social exclusion;
- an extensive knowledge of research and literature in relation to disadvantaged youth and the transition from school to work;
- A proven track record in the field of trans-national policy analysis, particularly in relation to poverty and social exclusion and disadvantaged youth.

#### **5. Time schedule and reporting**

See Article I.2. Of the Contract.

It is envisaged that the contract will begin in December 2004 and will be completed by mid September 2005.

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 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 above. 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.

## **6. Payments and standard contract**

Payments shall be made in EUR (€)

The terms of payment are as follows:

- 30% within 30 days after the signing of the contract
- the balance following the Commission's acceptance of both the final report and final invoice.

In drawing up the bid, the tenderer should take account of the provisions of the standard contract which include the "General terms and conditions applicable to contracts".

## **7. Price**

The price sought ought not to exceed € **200,000** (including travel and subsistence expenses).

The price should be indicated in Euro (€), excluding VAT (using the conversion rates published in the C series of the Official Journal of the European Communities on the day when the invitation to tender was sent out) and should be broken down as per the format given in Annex III of the attached draft contract to include:

- Part A: Fees and direct costs
  - Fees, expressed in number of person/days and unit price per working day for each Expert proposed. The unit price is expected to cover the expert's fees and administrative expenses, but it should not include the reimbursable costs defined below.  
This includes:
  - other direct costs, to be described

- Part B: Reimbursable Costs
- Travel expenses
- Daily subsistence allowances (DSA's): these cover all the subsistence costs of the Experts who are on mission for short term assignments outside their usual place of work
- Translations costs, if any
- Contingencies, if any

The total price = Part A + Part B

## **8. Composition of partnership or consortium**

If a partnership or consortium is envisaged, its composition should be specified and the criteria listed under point 10 should 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.

## **9. Exclusion criteria and evidence**

Regulation

*Article 93 of the Financial Regulation:*

1. Candidates or tenderers shall be excluded from participation in a procurement procedure if:
  - (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
  - (b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
  - (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
  - (d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
  - (e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities,' financial interests;

- (f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.
- 2. Candidates or tenderers must certify that they are not in one of the situations listed in paragraph 1.

*Article 134 of the Rule for Implementation – Evidence*

- 1. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in one of the situations described in point (a), (b) or (e) of Article 93(1) of the Financial Regulation, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- 2. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (d) of Article 93(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.  
Where no such certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.
- 3. Depending on the national legislation of the country in which the tenderer or candidate is established, the documents referred to in paragraphs 1 and 2 shall relate to legal persons and/or natural persons including, where considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or tenderer.

*Article 94 of the Financial Regulation:*

Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:

- (a) are subject to a conflict of interest;
- (b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

*See Annex I (which may be used as a checklist) for the supporting documents accepted by the European Commission to be provided by applicants, tenderers or bidders.*

*Any bid not including the supporting documents provided for in this Annex will be excluded.*

## **10. Selection criteria**

- 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 issues in relation to disadvantaged youth, demonstrated by providing a list of relevant policy analysis and research projects.
- Details of educational and professional qualifications of the persons undertaking the study. The project director will require a deep knowledge in relation to transition from school to work issues and social inclusion in Member States, Accessing Countries and Candidate Countries and of the different policy approaches being adopted; an extensive knowledge of the European and international literature and data on the links between youth unemployment / school rupture and social inclusion; a proven track record in the field of policy analysis, particularly in relation to poverty /social exclusion and sustainable integration of disadvantaged youth into the first labour market.
- The consultants/researchers should have no-conflict of interest and be completely independent. A statement of independence should be included in the offer.
- 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 to the tenderer whose offer represents the best value for money - taking into account the following criteria (It should be noted that the contract will not be awarded to a tenderer who receives less than 70 % on the Award Criteria):

1. The quality and consistency of the tender (**maximum 30%**)
  - the degree of understanding of the nature of the assignment, its context and results to be achieved (maximum 15%).
  - the quality and appropriateness of the strategy proposed for the implementation of the expertise (maximum 15%).
2. The technical value of the bid and the proposed methodological approach (**maximum 70%**)
  - the work plan: actions proposed to supplement the sources of information available, the knowledge and use of existing research in the fields covered by the expertise as well as available data to complement background information (maximum 20%).

- type of analysis provided: interpretation of quantitative and qualitative information according to the proposed strategy (maximum 20%).
- timetable including human resources mobilised to carry out the different stages of the work and the capacity to complete the work well in the time available (maximum 30%).

3. Price.

## **12. Content and presentation of the bids**

Content of the bids:

The tender must include:

- All information and documents necessary to enable the Commission to conduct an appraisal of the offer on the bases of the selection criteria and the award criteria (see points 10 and 11 above).  
This includes inter alia:
- A "Financial identification" form duly completed and signed by the bank.
- The price.
- The detailed curriculum vitae of the proposed expert(s).
- The name and quality 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).
- Social Security for individuals and VAT numbers or proof of exemption.

Presentation of the bids:

- Bids must be submitted in triplicate (1 original and 2 copies).
- Bids must contain all the information required by the Commission (see points 7, 8, 9 and 10 above).
- Bids must be clear and concise.
- Bids must be signed by the tenderer's legal representative. All unsigned bids will be excluded.
- Bids must 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.