



EUROPEAN COMMISSION
Employment, Social Affairs and Inclusion DG

Directorate C, Social Affairs
Unit C3, Disability and Inclusion

CALL FOR TENDERS

N° VT/2017/057

STUDY ON THE FEASIBILITY OF A CHILD GUARANTEE FOR VULNERABLE CHILDREN

TENDER SPECIFICATIONS

TABLE OF CONTENTS

TABLE OF CONTENTS	2
1. INFORMATION ON TENDERING	5
1.1. Participation	5
1.2. Contractual conditions	5
1.3. Compliance with applicable law	5
1.4. Joint tenders	5
1.5. Subcontracting	5
1.6. Structure and content of the tender	6
1.7. Identification of the tenderer	6
2. TECHNICAL SPECIFICATIONS	7
2.1. General background	7
2.2. General and specific objectives	8
2.3. Tasks	11
2.4. Input by the Contracting Authority	12
2.5. Intermediate outputs and deliverables	12
2.6. Final output and deliverables	13
2.7. Details on deliverables	14
2.8. Delivery time and meetings planned with the Contracting Authority	14
3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES	15
3.1. Content	15
3.2. Structure	16
3.3. Graphic requirements	16
4. EVALUATION AND AWARD	16

4.1. Verification of non-exclusion	16
4.2. Selection criteria	17
4.3. Award criteria	20
4.4. Ranking of tenders	22

LIST OF ACRONYMS USED

CoE	Council of Europe Curriculum Vitae
CV	Early Childhood Education and Care
ECEC	European Network of Ombudspersons for Children
ENOC	European Parliament
EP	European Pillar of Social Rights
EPSR	European Social Policy Network
ESPN	European Union
EU	(EU) Fundamental Rights Agency Preparatory
FRA	action
PA	(UN) Sustainable Development Goals United
SDG	Kingdom
UK	United Nations Convention on the Rights of the
UNCRC	Child Value Added Tax
VAT	

1. INFORMATION ON TENDERING

1.1. Participation

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

This procurement procedure is also open to all natural and legal persons established in a third country, which has a special agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Where the pluri-lateral Agreement on Government Procurement¹ concluded within the World Trade Organisation applies, the participation to this procedure is also open to all natural and legal persons established in the countries that have ratified this Agreement, on the conditions it lays down.

1.2. Contractual conditions

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

1.3. Compliance with applicable law

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU².

1.4. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In the case of a joint tender, all members of the group assume joint liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact (the leader) for the Contracting Authority for administrative and financial aspects, as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via documented powers of attorney.

1.5. Subcontracting

Subcontracting is permitted but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers are required to identify all subcontractors whose share of the contract is above 10% and whose capacity is necessary to fulfil the selection criteria.

During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the Contracting Authority.

¹ See http://www.wto.org/english/tratop E/gproc e/gp_gpa e.htm

² Directive 2014/24/EU of the European Parliament and of the Council, of 26 February 2014, on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

1.6. Structure and content of the tender

The tenders must be presented as follows:

Part A: Identification of the tenderer (see section 1.7)

Part B: Non-exclusion (see section 4.1)

Part C: Selection (see section 4.2)

Part D: Technical offer

The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

Part E: Financial offer

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

1.7. Identification of the tenderer

The tender must include a **cover letter** signed by an authorised representative presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney. The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) must provide a signed Legal Entity Form with its supporting evidence. The form is available on:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Tenderers that are already registered in the Contracting Authority's accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.

The tenderer (or the leader in case of joint tender) must provide a Financial Identification Form with its supporting documents. Only one form per tender should be submitted. No form is

needed for subcontractors and other members of the group in case of joint tender. The form is available on http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with [Commission Recommendation 2003/361/EC](#). This information is used for statistical purposes only.

2. TECHNICAL SPECIFICATIONS

2.1. General background

Preparatory Actions (PA) are an important tool for the European Parliament (EP) to formulate new political priorities and introduce new initiatives that might eventually turn into standing EU activities and programmes with their own budget lines.

A PA is designed to prepare proposals with a view to the potential adoption of future actions such as EU policies, legislation, and programmes with funding for not more than three successive financial years.

It is within this context that the European Parliament, in its 2017 budget, requested the European Commission to implement the following PA:

”Preparatory action - Child Guarantee Scheme / Establishing a European child guarantee and financial support”

This PA on establishing a possible Child Guarantee Scheme aims at laying down an implementing framework that is in accordance with the 2013 Commission Recommendation on Investing in Children³, while also taking into account other more recent initiatives in the social policy field such as the European Pillar of Social Rights (EPSR)⁴. Notably, Principle 11 of the EPSR is devoted to the right to affordable early childhood education and care (ECEC) of good quality, the right to protection from poverty and the right of disadvantaged children to specific measures to enhance equal opportunities. These are all relevant elements in the context of a child guarantee and the broader UN Sustainable Development Goals (SDG).

All parts of this action must follow a child-rights based approach. This means taking due account of:

- ❖ EU and international standards and good practices, as defined through the UN Convention on the rights of the child (UNCRC) and its general comments;
- ❖ the Council of Europe (CoE) standards and recommendations;
- ❖ other United Nations standards such as the UN Guidelines for the alternative care of children;
- ❖ the EU policies on de-institutionalisation (transfer to community and family based living), non-discrimination and desegregation in education and housing.

According to the budgetary remarks of the EP attached to this PA, the action should make sure

³ Commission Recommendation 2013/112/EU, of 20 February 2013, on Investing in children: breaking the cycle of disadvantage (OJ L 59, 2.3.2013, p. 5).

⁴ See Commission Communication Establishing a European Pillar of Social Rights (COM(2017)250 of 26.04.2017) and its accompanying Staff Working Document (SWD(2017)201 of 26.04.2017).

that "every child in Europe at risk of poverty (including refugee children) has access to free health care, free education, free childcare, decent housing and adequate nutrition. By covering these five areas of action through European and national action plans one would ensure that the living conditions and opportunities of millions of children in Europe improve considerably and with a long-term perspective"⁵.

In this context, the Commission has considered it necessary to first clarify the potential scope of the concept of a child guarantee by exploring the feasibility and analysing the conditions for the implementation of such a guarantee scheme. This will be done by focussing it on four specific groups of socially vulnerable children that are known to be particularly exposed to poverty and wellbeing risks. These groups are: (i) children living in precarious family situations⁶, (ii) children residing in institutions, (iii) children of recent migrants and refugees, and (iv) children with disabilities and other children with special needs.

These four groups are singled out because they currently present the most urgent acute needs and, consequently, they are those for which the idea of a child guarantee has the higher potential for improving their current living situation and wellbeing. It is however expected that the insights that this PA will acquire for these four groups can, eventually, be instrumental for the design of a child guarantee policy for larger groups of, and eventually all, children in the EU.

2.2. General and specific objectives

While the main responsibility to provide for children's wellbeing lies with their parents, if and when they are not able to do so, the State is obliged to help them or to intervene on their behalf. This is the common rationale behind the idea that the State should provide for a child guarantee scheme⁷.

The overall objective of the contract for this action is thus to prepare a detailed comprehensive study exploring what would be the most effective strategy for the competent authorities to realise such a child guarantee in practice.

Therefore, this study aims, in the first instance, at providing a thorough analysis of the design, feasibility, governance and implementation options of a possible future Child Guarantee Scheme in the EU Member States based on what is in place and feasible for the four groups of particularly vulnerable children listed above. The study should also attempt to explore the possibility of extrapolating and learning from the insights found for the four groups to larger groups of, or eventually all, children in the EU.

With these objectives in mind, it is expected that the **main part of the final study** will provide answers to, at least, the following key questions for each of the four vulnerable groups:

- i. What is the current state of play in terms of gaps and overlaps with existing policy instruments (at national and EU level) with regards to the access of the four target groups to the components of the child guarantee as originally formulated by the

⁵ See item 04 03 77 25 in Annex 3 PP/PA Budgetary remarks as in 2018 Budget

⁶ The precariousness may capture different realities such as, for instance, single parenthood or the phenomenon of children being "left behind" by parents working elsewhere in the EU who are raised by other family members.

⁷ This obligation is inherent to article 3(2) of the UN Convention of the Rights of the Child (UNCRC), which states that: "*States Parties undertake to ensure the child such protection and care as is necessary for his or her well-being, taking into account the rights and duties of his or her parents, legal guardians, or other individuals legally responsible for him or her, and, to this end, shall take all appropriate legislative and administrative measures*". All EU Member States have ratified this Convention and are therefore subject to the obligations it imposes.

For further information, see: <http://www.ohchr.org/en/professionalinterest/pages/crc.aspx>

- European Parliament in its request to the Commission (i.e. access to free health care, free education, free childcare, decent housing and adequate nutrition)?
- ii. Which level of authority (national, regional, local) bears the responsibility for the timely delivery of these (often local) services? Who is paying for them and who is taking corrective action in the case of lack of actual access to them?
 - iii. Are these services best delivered in kind or alternatively against a means-tested cash fee?
 - iv. How is the problem of stigmatisation and non-take up of services addressed?
 - v. What is the best way to make sure that there is effective cooperation between the various local service providers to arrive at a genuine integrated approach?
 - vi. What is the overall feasibility, including an assessment of costs of implementation options and possible additional administrative burden, and the enforceability of those components?
 - vii. What additional concrete policy actions should be undertaken by the Member States in order to fully comply with the obligations, as formulated in the UNCRC, that form part of a child guarantee?
 - viii. What is or should be the role for the EU in this, notably via Principle 11 of the EPSR?
 - ix. What should be the response if Member States excuse themselves for not being able to honour the components of the child guarantee for certain children due to a "force majeure" type of emergency (e.g. after a sudden/unexpected influx of very large groups of refugee children compared to the social housing currently in place in the Member State)?⁸
 - x. What would be the added value of an EU level child guarantee for each of the four groups of children compared to the existing national legal framework? How would possible EU-level actions comply with the rule of subsidiarity?

While developing the analysis on each of the four vulnerable groups, the study shall also examine and duly take into consideration two other closely related policy aspects:

- i. the political and financial feasibility of applying to the set-up of the Child Guarantee the so-called comprehensive or integrated approach⁹
- ii. the general poverty and inequality context affecting children in the EU Member States; more specifically, the large differences in levels of welfare state provision between the countries and the impact of parents' joblessness or low-work intensity as an important risk factor exposing children and families to poverty.

The **concluding part of the final study** shall focus on providing some first preliminary

⁸ Article 4 of the UNCRC acknowledges that "*States Parties shall undertake all appropriate legislative, administrative, and other measures for the implementation of the rights recognized in the present Convention. With regard to economic, social and cultural rights, States Parties shall undertake such measures to the maximum extent of their available resources and, where needed, within the framework of international co-operation*".

⁹ A recent example of such a policy whose effectiveness could be analysed is the "Kein Kind Zuruecklassen" programme of North Rhine Westphalia (DE). For details, see: <https://www.land.nrw/de/kein-kind-zuruecklassen-kommunen-nrw-beugen-vor>

indications as to how the conclusions reached and the solutions identified for the four groups of vulnerable children could be extrapolated to larger groups and eventually all children in the EU. This concluding part of the final study shall simply lay down the basis for future followup work on such extrapolation. The main policy issue for this part of the study is the added value of an EU-level guarantee scheme compared to the current situation. In order to assess this, as a minimum the following questions need to be addressed:

- i. How are the rights granted to all children in the area of nutrition, education, health care, housing and childcare best exercised/fulfilled/realised? Should these rights be based on minimum standards of service provision applying across all countries?
- ii. Does the approach of targeted universalism represent a sensible compromise when it comes to simultaneously supporting all children and specific disadvantaged groups?
- iii. It is well known that in practice there is a large gap between the many existing access to services rights as described in the UNCRC, and the actual fulfilment of these rights. At the same time State parties are the primary duty bearers under the UNCRC. Given that all EU countries have ratified this Convention, how can it best be ensured that all children will benefit from a minimum essential level of rights ("minimum core obligations")?

2.3. Tasks

In order to collect the most widely shared and up-to-date insights, extensive external input for the study has to be sought from a wide range of stakeholders and policy-makers. For this reason, the study is to be informed by four fact-finding thematic workshops, each of which should preferably take place in a Member State specifically concerned by the topic to be discussed (the Commission will take the final decision about the workshops' host countries). The process should be supported through a dedicated website and should be closed with a final conference. While the contractor is encouraged to record innovative or even dissenting views, it remains independently responsible for the drawing up of the recommendations in the final study.

In the framework of this contract the contractor will be expected to carry out the following tasks:

- i. Map the learning from implementation of the 2013 Recommendation Investing in children: breaking the cycle of disadvantage to date. Mapping the existing policy instruments available as at 1 January 2018 at national and EU level for EU28. Mapping research, reports and findings, including the 2013 and 2017 reports on the national implementation done by the independent social inclusion experts of the European Social Policy Network (ESPN) and the work done by the non-governmental organisation EU Alliance for Investing in Children¹⁰.
- ii. Complement this mapping exercise with eight case studies focusing on funding as leverage. The contractor shall assess how EU or other international funding (e.g. Norway grants, World Bank, Atlantic Philanthropy, Open Society Foundation, etc.) has enabled the development and roll-out of innovative and/or proven interventions in the Member States for each of the four groups of vulnerable children.
- iii. Collect the insights articulated by the stakeholders and policy makers at the four fact-finding thematic workshops to be organised in the framework of this action, as well as through online submissions to a dedicated website and the initial reactions expressed at

¹⁰ <http://www.alliance4investinginchildren.eu/>

the closing conference.

- iv. Consult national authorities, international organisations such as the OECD and UNICEF as well as civil society and other stakeholders at national and EU level academics focusing on social inclusion policy and practice, child rights and child poverty, early childhood development, early childhood education and care, health, housing and homelessness. The mention of national authorities should be understood as including departments for children and social affairs, education, health, social protection and national managing authorities for EU structural funds,
- v. Consult the Fundamental Rights Agency (FRA), the European Network of Ombudspersons for Children (ENOC)¹¹ and other European institutions and agencies such as Eurofound.

2.4. Input by the Contracting Authority

The contracting authority will take care of the logistics needed to organise the four thematic workshops and the closing conference namely the payment for the venue, invitation, travel, hotel and meal costs of the participants and speakers, plus interpretation and translation costs. Travel and hotel cost of the contractor's staff (i.e. moderators and the rapporteurs) are to be paid by the contractor.

2.5. Intermediate outputs and deliverables

During the implementing of this action, the contractor must provide at least the following intermediate outputs and deliverables:

- i. A general inception report for the study. The minimum requirements for the inception report are:
 - A. min. 100-page inception report providing a first mapping of the *status quo* plus a description of the work process to attract the interest and involvement of the various stakeholders mentioned in section 2.3 above throughout the process.
 - It shall contain an estimate of the size and a mapping of the starting situation for each of the four groups of children plus a number of policy questions to be discussed at the thematic workshops.
 - It shall also serve to inform interested stakeholders about the work process.
- ii. A website aimed at facilitating the collection of online contributions and the presentation of the various intermediate reports and studies to the stakeholders. It shall provide up-to-date information on the development of the action. The website contents and upkeep fall under the sole responsibility of the contractor. The contents of the website shall be preserved so that its information can potentially be used as input for future work on this topic.
- iii. Four fact-finding thematic workshops. The minimum requirements for the fact-finding thematic workshops are to:
 - Provide programmatic support for the organisation of four fact-finding thematic workshops with a maximum of 100 participants each.

¹¹ The National Ombudsperson for Children is the first guardian of the children's rights in the Member States who themselves are the most important duty bearers for these rights. For more details on ENOC, see: <http://enoc.eu/>

- Identify possible options for the appropriate country location (see point 2.3 i), taking into account that each of them is to be held in a Member State particularly concerned by the topic to be discussed.
 - Prepare a min 60-page discussion paper per fact-finding thematic workshop.
 - Make a programme proposal and help in selecting the format and the speakers for each of the four fact-finding thematic workshops. Each of them shall have a keynote speaker and speakers representing both civil society and policymakers.
 - Provide a moderator to host the workshops and guiding the discussion and a rapporteur to draft detailed minutes for each fact-finding thematic workshop. This material will feed into the final study.
- iv. An intermediate report for which the minimum requirements are:
- A max. 150-page intermediate report summarising the preliminary findings of the four fact-finding thematic workshops in the form of policy pointers and recommendations so that they can be vetted during the general conference.
- v. Assist the Commission in preparing the programme of each of the four fact-finding thematic workshops and the closing conference, as well as with the selection of the speakers, the participants and the location for those five events¹².

2.6. Final output and deliverables

At the end of the action, the contractor must present at least the following final deliverables:

- i. A final closing conference. The minimum requirements for the closing conference are:
- Provide programmatic support for the organisation of a closing conference on the theme of an EU Child Guarantee with a maximum of 300 participants, to be defined by the Commission. The conference, to take place in Brussels, shall at least contain an opening session, a plenary discussion of the main findings and closing session with a panel discussion.
 - Provide assistance in preparing the format and the speaker selection for the closing conference, and provide moderators and rapporteurs.
 - Present the findings of the four fact-finding thematic workshops and the preliminary study results.
- ii. A study for which the minimum requirements are:
- A final max. 200-page (excluding annexes) consolidated report summarising the research conducted by the contractor plus the feedback received from the four fact-finding thematic workshops and the closing conference.
 - The final study shall contain a 6-page executive summary in English, French and German
 - Inclusion of all the findings, conclusions and recommendations for the four target groups, as well as the wider preliminary implications for a universal child guarantee

¹² The practical logistical needs for the four thematic workshops and the closing conference are not part of this contract and will be provided by the Commission through existing framework contracts with other contractors. See section 2.4 above.

for all children.

2.7. Details on deliverables

All papers and reports must be prepared in English.

The inception papers and the report for the closing conference must be made available on time electronically on a dedicated website. This website shall also allow for online submissions by stakeholders.

2.8. Delivery time and meetings planned with the Contracting Authority

The contract duration is 18 months. The website and the general inception report shall be delivered in the 2nd month of the contract. The four fact-finding thematic workshops shall take place within the first 9 months after signing the contract. The discussion paper for each of the four workshops shall be ready 1 months in advance. The intermediate report shall be delivered in the 10th month of the contract. The closing conference shall take place within 12 months of the start of the contract. The Study shall be delivered at the end of the contract.

The contractor shall set up regular phone meetings with the Contracting Authority to allow for an exchange of information, feedback and guidance. There shall be a face-to-face kick-off meeting within 4 weeks of the signing of the contract and a preparatory meeting for each of the four fact-finding thematic workshops and the closing conference.

Time schedule	Total duration of the contract is 18 months	Payment Request
1 st month	Kick off meeting with the Commission	
2 nd month	Website in place and the general inception report.	First Interim Payment (30%)
7 th month	Discussion papers in time before each of the 4 workshops	
8 th month	Preparatory meetings for the workshop with the Commission	
9 th month	4 fact finding workshops	
10 ^e month	Intermediate report feeding closing conference	Second Interim Payment (40%)
17 ^e month	Preparatory meeting with the Commission on closing conference	
month	Closing conference	
month	Study	Final payment (30%)

3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

3.1. Content

3.1.1. Study

The contractor must deliver the final study in English with a 6-page executive summary in English, French and German.

The study must include:

- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority
- the following disclaimer:

“The information and views set out in this study are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

3.1.2. Publishable executive summary

The publishable executive summary must be provided in English, French and German, and must include:

- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority
- the following disclaimer:

“The information and views set out in this study are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

3.1.3. Requirements for publication on the internet

The Commission is committed to making online information as accessible as possible to the largest possible number of users, including those with visual, auditory, cognitive or physical disabilities, and those without access to the latest technology. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility for information providers, see: http://ec.europa.eu/ipg/standards/accessibility/index_en.htm

For the publishable versions of the study, abstract and executive summary, the contractor must respect the W3C guidelines for accessible PDF documents as provided at: <http://www.w3.org/WAI/>.

3.2. Structure

The contractor is free to choose the structure of the report.

3.3. Graphic requirements

The contractor must deliver the study and all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at:

http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm

A simple Word template will be provided to the contractor after contract signature. The contractor must fill in the cover page in accordance with the instructions provided in the template. The use of templates for studies is exclusive to European Commission's contractors. No template will be provided to tenderers while preparing their tenders.

4. EVALUATION AND AWARD

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- verification of non-exclusion of tenderers on the basis of the exclusion criteria
- evaluation of tenders on the basis of selection criteria
- verification of compliance with the minimum requirements set out in these tender specifications
- evaluation of tenders on the basis of the award criteria

The contracting authority may reject abnormally low-priced tenders, in particular if it is established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The tenders will be assessed in the order indicated above. Only tenders meeting the requirements of one step will pass on to the next.

4.1. Verification of non-exclusion

All tenderers must provide a declaration on honour (see Annex 1), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of a joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, subcontractors whose share of the contract is above 10% and whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The Contracting Authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose share of the contract is above 10% and whose capacity is

necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.2. Selection criteria

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

4.2.1. Declaration and evidence

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 1), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them individually. For the criteria applicable to the tenderer as a whole the tenderer (sole tenderer or leader in case of joint tender) must provide the declaration on honour stating that the tenderer, including all members of the group in case of joint tender and including subcontractors if applicable, fulfils the selection criteria for which a consolidated assessment will be carried out.

This declaration is part of the declaration used for exclusion criteria (see section 4.1) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the declarations on honour. Nevertheless, it reserves the right to require evidence of the legal and regulatory, financial and economic and technical and professional capacity of the tenderers at any time during the procurement procedure and contract performance. In such case the tenderer must provide the requested evidence without delay. The Contracting Authority may reject the tender if the requested evidence is not provided in due time.

After contract award, the successful tenderer will be required to provide the evidence mentioned below before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.2.2. Legal and regulatory capacity

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) must provide the following information if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.
- For natural persons, if required under applicable law, a proof of registration on a professional or trade register or any other official document showing the registration number.

4.2.3. Economic and financial capacity criteria

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderers must comply with the following selection criteria:

- **Criterion F1:** Turnover of the last two financial years above EUR 700 000; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

Evidence (to be provided on request):

Copy of the profit and loss accounts and balance sheet for the last two years for which accounts have been closed from each concerned legal entity

- Failing that, appropriate statements from banks

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

4.2.4. Technical and professional capacity criteria and evidence

A. Criteria relating to tenderers

Tenderers (or, in case of a joint tender, the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below. The evidence must be provided only on request.

The project references indicated below consist of a list of relevant services provided in the past five years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients.

- **Criterion A1:** The tenderer must prove knowledge and experience of EU social policy, in particular in the fields of child and family policy, and child poverty. Specific knowledge in one or more of the following policy areas will be considered as an important asset: de-institutionalisation, child migrants and refugees, children with disabilities and children with special needs. Proven expertise in how to provide disadvantaged children with access to housing, education, health, proper nutrition and childcare will also be considered an advantage.

Evidence A1: The tenderer must provide reference of his knowledge for each of the 4 identified vulnerable groups in the form of 2 projects with a minimum value per project of EUR 100 000 delivered in the last five years coming from different parts of the EU.

- **Criterion A2:** The tenderer must have experience in data collection and the drafting of reports and policy recommendations.

Evidence A2: The tenderer must provide references to studies or projects delivered in the last five years showing this expertise.

- **Criterion A3:** The tenderer must prove its capacity to work proficiently in English.

Evidence A3: The tenderer must provide references to 3 studies delivered in the last five years showing the necessary language coverage.

B. Criteria relating to the team delivering the service

The team delivering the service shall include, as a minimum, the following profiles. It is acceptable that two of the profiles are shared by one person. Evidence must be presented in the form of a *curriculum vitae* (CV) of the team member responsible for delivering the service. Each CV shall indicate the intended role of the person concerned in the delivery of the service.

- **B1 - Project Manager:** At least 7 years of experience in project management of teams of at least 5 persons, including overseeing project delivery, quality control of the delivered service, client orientation in a project of a similar size (i.e., at least EUR 300 000 covering at least 10 EU Member States or candidate countries). The project manager must also have 5 years of experience as an organiser of international seminars and/or conferences.
- **B2 - Study editor:** At least 7 years of experience in writing and editing social policy studies in which EU Member States are analysed and compared.
- **B3 - Website editor:** At least 5 years of experience in writing and editing social policy

websites in which EU Member States are analysed and compared.

- **B4 - Workshop/Conference animator/moderator:** At least 5 years of experience in hosting and leading EU social policy workshops, seminars and conferences in English.
- **B5 - Social policy expert specialised in support to children in vulnerable situations (notably, refugees and migrant children, children with disabilities or other special needs):** At least 3 years of experience and proficient in written and spoken English.
- **B6 - Social policy expert specialised in de-institutionalisation and support to children in institutions:** At least 3 years of experience and proficient in written and spoken English.

4.3. Award criteria

The contract will be awarded based on the most economically advantageous tender, according to the "best price-quality ratio" award method. The quality of the tender will be evaluated based on the four criteria described below. The maximum total quality score is 100 points.

- **Criterion 1: Relevance, adequacy and efficiency of the methodology proposed to carry out the assignment** (50 points - minimum score 50%)

This criterion serves to assess the working method of the tenderer in view of collecting high quality information from the various stakeholders and subsequently condensing the information for each of the four target groups into the final study.

This criterion will assess in particular to what extent the offer:

- demonstrates how the tenderer understands the project in terms of policy development and stakeholder involvement
- provides a detailed overview of the proposed data collection method, as well as evidence building and information sources to be used
- demonstrates the ability/capacity to access the desired information
- describes the expected quality and usefulness of the information that will be collected

- **Criterion 2: Appropriateness of the proposed work organisation and capacity to steer the work process** (30 points - minimum score 50%)

This criterion serves to assess the organisation and distribution of work within the proposed project team for the different building blocks of the study and the global allocation of time and resources to the different tasks of the project.

This criterion will assess in particular to what extent the offer:

- provides a clear description of the division of work and the roles and responsibilities within the team
- outlines the project timeline for the various tasks, with the proposed milestones, conducive to a timely delivery of the intermediate and final outputs

- provides detailed information on the rationale behind the proposed allocation of time and human resources
- **Criterion 3: Capacity to assist the Commission in organising the four thematic workshops and the final closing conference** (10 points - minimum score 50%)

This criterion serves to assess the operational capacity of the contractor on the ground.

This criterion will assess in particular to what extent the offer:

- Includes the access to a sufficient pool of experts in terms of size, geographical coverage, relevance and quality.
- Shows evidence, though the provision of examples of events organised by the contractor in the past, of its capacity to identify knowledgeable speakers, suitable moderators and rapporteurs.
- **Criterion 4: Quality control measures** (10 points - minimum score 50%)

This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality and timeliness of the deliverables.

This criterion will assess in particular to what extent the offer:

- proposes a detailed and targeted quality control system which is specific to the tasks at hand
- is able to identify potential delivery risks and propose redress mechanisms throughout the process

The maximum total score is 100 points. Tenders must score a minimum of 50% for each criterion and a minimum of 70% in total. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

Criterion	Maximum points	Minimum score
Relevance, adequacy and efficiency of the methodology proposed to carry out the assignment	50	50%
Appropriateness of the proposed work organisation and capacity to steer the work process	30	50%
Capacity to assist the Commission in organising the four thematic workshops and the final closing conference	10	50%
Quality control measures	10	50%
Overall assessment	100	70%

4.4. Ranking of tenders

The contract will be awarded to the most economically advantageous tender in accordance with the formula below. No weighting is given to quality and price.

Score for tender X	-	cheapest price	*	total quality score (out of 100) for all criteria of tender X
		price of tender X		

The tender ranked first after applying the formula will be awarded the contract.

