



European Centre for the
Development of Vocational Training
Procurement Service

Thessaloniki, 29/05/2007
PRO/2007/250

OPEN INVITATION TO TENDER

AO/B/JB/OccupationalEducationalStandards/004/07

“The dynamics of qualifications - the definition and renewal of occupational and educational standards”

Dear Sir/Madam,

Thank you for the interest you have shown in this tender.

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tendering Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted in one of the official languages of the European Union.
2. Tenders may be submitted:

(a) either by post or by courier service to be dispatched not later than **09/07/2007** in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
For the attention of Mr G. Paraskevaïdis
PO Box 22 427
GR-55102 Thessaloniki
Greece**

Important:

Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu) or fax (+30 2310 49 00 28)

- ✓ *that they have submitted an offer in time, and*
- ✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*

(b) delivered by hand not later than **17:00** on **09/07/2007** to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaïdis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece**

In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned service who took delivery. Cedefop is open from 09h00 to 17h00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

3. Tenders must be submitted strictly adhering to the following.

The outer envelope or parcel should be sealed with adhesive tape and signed across the seal and carry the following information:

OPEN INVITATION TO TENDER Cedefop No: AO/B/JB/OccupationalEducationalStandards/004/07 ‘The dynamics of qualifications - the definition and renewal of occupational and educational standards’ Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The outer envelope must contain three inner envelopes, namely, **Envelope A, B and C**. The content of each of these three envelopes is described in point 6 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on **19/07/2007, 11h00** (local time). Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (+30 2310 49 00 28) or by e-mail (c4t-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by fax (+30 2310 49 00 28) or by e-mail (c4t-services@cedefop.europa.eu).

Request for additional information received less than five working days before the closing date for submission of tenders will not be processed.

- The contracting authority may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.

Any additional information, including that referred to above, will be published on Cedefop’s website. Please ensure that you visit the site regularly for updates.

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.

8. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful tenderer.
9. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
10. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. This decision must be substantiated and the tenderers notified.
11. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

signed George Paraskevaïdis
Head of Finance & Procurement

Attached: Tendering Specifications

OPEN INVITATION TO TENDER

AO/B/JB/OccupationalEducationalStandards/004/07

**‘The dynamics of qualifications - the definition and renewal
of occupational and educational standards’**

Tendering specifications

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Introduction to Cedefop

The European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union. Created in 1975 with a tripartite Governing Board, it provides services for the European Commission, the European Union Member States and the social partners as well as for the associated countries of Iceland and Norway. The candidate countries are also associated with its activities.

As the European Union's reference centre for vocational education and training, Cedefop provides policymakers, researchers and practitioners with information to promote a clearer understanding of developments and so enable them to take informed decisions on future action. Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training.

The main tasks of Cedefop as defined in its founding Regulation are to:

- compile selected documentation and analysis of data;
- contribute to the development and coordination of research;
- exploit and disseminate useful information;
- encourage and support a concerted approach to vocational training development issues;
- provide a forum for a wide and diverse audience.

Cedefop's medium-term priorities for 2006-08 concentrate on the priorities set out in the Maastricht communiqué, which has been agreed by 32 countries, the European Commission and the European social partners:

- a) 'promoting the image and attractiveness of the vocational route for employers and individuals to increase participation in VET;
- b) achieving high levels of quality and innovation in VET systems to benefit all learners and make European VET globally competitive;
- c) linking VET with the knowledge economy's requirements for a highly skilled workforce and especially, because of the strong impact of demographic change, the upgrading and competence development of older workers;
- d) addressing the needs of the low-skilled (about 75 million people aged between 25 and 64 in the EU) and disadvantaged groups so as to achieve social cohesion and increase labour market participation.'

More information about Cedefop can be found on its website: <http://www.cedefop.europa.eu>

1 Overview of this tender

1.1 Description and type of the contract

a) Description of the contract

The purpose of this invitation to tender is to launch a European comparative study on the relationship between occupational and education-training standards and the way these standards influence qualifications. The ultimate purpose of the study is to improve our understanding of the relationship between employment and education/training and how we can improve the match between demand and provision of education, training and learning. The focus of the study is on vocational education and training.

b) Type of contract

The type of contract is a service contract.

1.2 Place of delivery or performance

The tasks must be completed externally.

1.3 Division into lots

This invitation to tender is not divided into Lots.

1.4 Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications.

1.5 Value or quantity of purchase

Estimated expenditure for this activity is 110000 EUR.

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least six months following the final date of submission of offers.

1.7 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party and shall be valid for a period of 1 year.

1.8 Main terms of financing and payment

Payments will be made 30 days after submission of invoices and according to the conditions set out in the draft contract.

2 Technical specifications

2.1 Introduction

The Recommendation on a European Qualifications Framework (EQF) for lifelong learning (Com (2006) 479) defines a qualification as *'a formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to a given standard.'*

This definition points to the critical role played by *standards* - also to be understood as agreements on norms or specifications - in forming and reforming qualifications systems and frameworks. Standards are potentially powerful tools for influencing the profile, structure and quality and the language of education, training, evaluation and learning. They can be seen as the interface between the labour market and the education and training system. Standards express, in a codified way, the basic objectives pursued by users (individual citizens, employers) as well as providers (education and training institutions, certifying institutions) of qualifications. In general, qualifications relate to two main categories of standards; *occupational* and *education-training standards*. These two categories can also be described as employment and teaching/learning specifications respectively and operate according to different logics, reflecting different sets of priorities, motivations and purposes.

- Occupational standards are classifications and definitions of the main jobs that people do. Following the logic of employment, these standards will focus on what people need to do, how they will do it, and how well they do it. Occupational standards thus have to be written as competences and formulated in terms of outcomes. They exist in all European countries but each nation has its own style of derivation and presentation of the standards. An important reason for defining standards is to enable national education and training to producing people skilled in the right areas for the labour market. However, standards serve other purposes; these include defining state of the art working practice so that companies can modernise more easily, shifting the focus of the national labour market into new areas (e.g. from manufacturing to new service areas), and for analysis of the labour market and in particular identifying skills gaps and skills shortages. Occupational standards form a bridge between the labour market and education because educational standards (syllabuses and pedagogies) can be developed from them.
- Education-training standards, following the logic of education and training, will focus on what people need to learn, how they will learn it, and how the quality and content of learning will be assessed. The main interest is thus formulated in terms of input (subject, syllabus, teaching methods, process and assessment). Educational standards are normally written as teaching specifications and qualification specifications. For example to be a skilled plumber you need to study these subjects at this type of institution for this many years and use this text book or manual. Now occupational standards, written as competences are forcing a change in the way educational standards are to be written - as learning outcomes which are statements of what a person knows and can do in the work situation.

To understand the impact of standards on qualifications it is necessary to analyse the relationship between occupational and education-training standards. Qualifications bridge the two types of standards. They are specified in terms of the former and can be seen as the product of the latter. Therefore the relationship between the two sets of standards is intertwined with the nature of qualifications. A European study of the relationship between these two categories of standards and their impact on qualifications will need to be based on comparative analysis that takes into account national differences and similarities in terms of economies; culture, history and traditions have all influenced the definition of standards and qualifications. An important question, following the increased cooperation in European education and training (Bologna process and the European Union Lisbon process) is whether

a more international approach to the formulation of standards is developing. Such a tendency may also be promoted by developments at sector level, promoting qualifications frameworks and standards outside the national qualifications systems (for example ICT Qualifications framework).

The relationship between occupational and education-training standards can be described as a feed-back loop. A complete feed-back loop would increase the relevance of standards - and qualifications referring to these; an incomplete feed-back loop would, alternatively, result in mismatch and reduce the overall relevance and quality of standards and qualifications. In some countries, for example the UK, we can see that assessment standards are developed as a third, separate category of standards. Where relevant, the study should comment on and take into account the impact of these assessment standards. The character and overall efficiency of this feed back loop will depend on a number of interlinked questions:

- What kind of information/documentation is used to define and redefine occupational standards (for example data on economic and technological trends, sectoral surveys, mid and/or long term forecasting etc.);
- Which are the methods used to develop occupational standards (functional analysis, DACUM¹, job-analysis etc.);
- What kind of information/documentation is used to define and redefine education-training standards (data on economic and technological trends, content/subject surveys, national, regional and institutional policy documents, etc.);
- What is the role of occupational standards in the definition of education-training standards, and how are they used;
- How are qualification specifications linked to the occupational standards and the education-training standards;
- What is the profile of education-training standards, in particular as regards the balance between learning outcomes (what a holder of a qualification is expected to know or be able to do) and learning inputs (learning content, duration and location, process etc.);
- To which extent and in which way is information regarding the relevance and appropriateness of standards and qualifications used by labour market authorities to improve the match between demand and provision of qualifications.

This feed-back loop has been described by Mansfield and Schmidt (2001²) and by Fretwell et al. (2001³).

There is a close relationship between standards and assessment methods and practises. Assessment is critical when judging whether a person has obtained learning outcomes to a given standard. Assessment methods and systems have been developing rapidly the last decade, not least focussing on the opening up towards non-formal and informal learning. Of critical importance is the degree to which the assessment methods used are influenced by the occupational standards and how they are specified in the education-training standards.

¹ Developing A Curriculum

² Mansfield, B. and Schmidt, H. (2001): Linking Vocational Education and training Standards and Employment requirements, an international manual. European Training Foundation, Turin

³ Fretwell, D., Lewis, M.V. and Deij, A. (2001): A framework for defining and assessing occupational and training standards in developing countries, World Bank, Ohio State University and European Training Foundation, Turin

There is furthermore a direct relationship between education-training standards and curriculum developments. The curriculum can be seen as an expression, by the education and training providers, of the education-training standards and, more indirectly, of the occupation standards. The increased emphasis on learning outcomes could potentially change curriculum development. The study also needs to take into account that more and more learning is defined, provided and assessed in smaller bits (as units or modules). In continuing training, programmes tend to be narrower and more labour market focused than in initial education and training that also has to ensure progression and the achievement of educational goals. Moreover, occupational standards have often been used to define separate competences that could be learned and assessed as individual units.

2.2 General purpose/objective

The objective of this study is to produce a report on the relationships between occupational and education-training standards, and the associated qualifications, for the 32 countries participating in the Education 2010 process. The report needs to describe arrangements, report trends and make suggestions for improving links between the labour market and qualifications systems through the use of standards.

The report should be based on a comparative study of the relationship between occupational and education-training standards and the way these standards influence qualifications. The ultimate purpose of the study is to improve our understanding of this relationship (feed-back loop) and how the match between demand and provision of education, training and learning can be improved.

The final report should address the main stakeholders at national and other relevant levels involved in the definition and development of standards and qualifications.

The focus of the study is on vocational education and training qualifications. Other qualifications, general and academic, are relevant to the study when major overlaps or alternative models/approaches can be identified.

2.3 Description of the tasks

A key task the contractor would be required to perform is to provide an updated overview of the relationship between occupational and education-training standards, and the associated qualifications (in this study focussing on VET), in the countries participating in the Education and training 2010 cooperation process.

2.3.1 Tasks

The contractor shall produce a report addressing the relationship between occupational and education-training standards, and associated qualifications, addressing differences/similarities between national approaches. The main focus of the study is on standards relevant to vocational education and training.

To arrive at this analysis, the contractor will be responsible for carrying out extensive desk based research, a systematic dialogue with relevant stakeholders at relevant levels and for producing a final analysis seeking to identify main tendencies, dilemmas and challenges in this field.

2.3.2 Methodology

Given the high number of countries, an important first stage of the comparative study has to be based on extensive desk based research mapping existing, relevant material. This first stage should both focus on material covering national practises and theoretical literature addressing the principles of standards definition and development.

The desk based research should result in a series of tentative descriptions of the situation in the countries covered by the study. These tentative descriptions should be used as a basis for a dialogue with relevant stakeholders in the different countries (national authorities linked to education and employment, employer organisations, trade unions, chambers of commerce, qualification authorities and others) involved in the process of standards development and reform.

The results of these two interlinked stages should be further tested and developed through workshops addressing issues of particular interest and relevance.

2.4 Deliverables, reports and timetable (outcome)

The main deliverable will be a final report (+/- 100 pages) presenting and analysing main tendencies in this field.

A draft interim report, reporting on the findings from the desk based research, should be delivered 4 months after the signing of the contract. Following comments by Cedefop, a final interim report should be delivered 5 months following the signing of the contract. The interim report should be used as a basis for systematic dialogue with stakeholders at national and other relevant levels.

A draft final report should be delivered 10 months following the signature of the contract, a final report after 11 months.

2.5 Meetings

The contractor should be prepared to support Cedefop in organising 2 workshops, of 2 working days each, on issues of particular relevance to the study where in depth dialogue with stakeholders will be necessary. Additionally an introductory 1 day meeting would be needed as well as one more 1 day meeting for extra support and discussion. In total the contractor should be prepared to visit 4 times Cedefop and be present for 6 working days meetings. All costs incurred, including travel-accommodation etc of those meetings shall be included in the Contractor's financial offer (see also point 5.4).

2.6 Travel expenses

Other travel expenses for meetings apart from those mentioned under point 2.5 that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract in Annex B).

3 Specific information concerning participation to this tender

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) 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) have been convicted of an offence concerning their professional conduct by a definitive judgement;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) 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) have been the subject of a definitive judgement for fraud, corruption, involvement in a criminal organization 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 a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- 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.

Means of proof required

The tenderer shall provide the self-declaration found in Annex C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

Cedefop reserves the right to check the situation described in points c) and f).

3.2 Selection criteria

The tenderer must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

Economic and Financial capacity

Requirement

- The tenderer must be in a stable financial position and have the economic and financial capacity to perform the contract.

Proof of economic and financial capacity may, in particular, be furnished by **one or more** of the following documents:

- appropriate statements from the banks or evidence of professional risk indemnity insurance;

- balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

In case tenderers are unable to furnish such documents they are required to provide justification for non provision.

Technical and professional capacity

Requirement

The technical and professional requirements that the tenderer must possess are:

- ✓ Qualifications, knowledge and ability to perform the tasks outlined in section 2.3 of these technical specifications;
- ✓ Extensive professional experience in the field of education, training and learning and a particular experience in relation to the development and use of standards and how they influence qualifications systems and frameworks;
- ✓ Proven experience of comparative analysis in the field of education and training;
- ✓ Experience of working in a multicultural and multilingual environment;
- ✓ Linguistic ability to communicate and draft to a high standard in English and communicate in French and/or German;

The following documents or information must be presented as evidence of compliance with the above criteria:

- detailed CV of the contractor and, if applicable, of the research team members with a brief description of research output/publications related to the issues addressed by this study;
- list of major contracts/studies performed in the past five years with dates and commissioning authorities;
- description of any technical equipment and tools to be employed by the Contractor in the performance of the contract;
- description of measures employed to ensure the quality of services;
- an indication of what proportion, if any, of the contract the Contractor may intend to sub-contract.

3.3 Legal Position

Tenderers are requested to complete the Legal entity form found in Annex D and to provide the documents requested in the form. Tenderers must be sure to include the name and function of the individual(s) entitled to sign on behalf of the organisation in the case of contract award.

4 Additional information concerning participation in this tender

4.1 Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such grouping (or consortia) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a tender.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria 'technical and professional capacity', the evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

If awarded, the contract will be signed by the company or the person heading the project who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract. Tenders from consortia of firms or group of service providers, contractors or suppliers, must specify the role, qualifications and experience of each member or group.

4.2 Subcontracting/Subcontractors

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the tenderers tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. The subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition. If awarded, the contract will be signed by the Tenderer, who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

The tenderer must indicate clearly, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 10% of the work by value.

All subcontractors must provide the required evidence for the exclusion and selection criteria.

Where no subcontractor is given, the work will be assumed to be carried out directly by the bidder.

5 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender that offers the best value for money (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the total points for quality by the total price, thus indicating which tender represents the best value for money.

5.1 Technical evaluation

The following technical award criteria will be applied to this tendering procedure:

- (A) **The level of understanding of the nature of the assignment**, its context and results to be achieved (40 points)
 - a. Conceptual and methodological approach for undertaking the study in accordance with the objectives and purpose of the tender (20 points).
 - b. Demonstration of an in-depth understanding of current research, policies, developments and challenges related to the occupational and education-training standards (20 points).
- (B) **The quality and appropriateness of the methods suggested to carry out the work** (30 points)
 - a. Appropriateness of the working methods (envisaged steps, research methods, data sources to be used) to meet the requirements outlined in these Technical Specifications (30 points).
- (C) **The organisation and management arrangements** (30 points)
 - a. Allocation of tasks, type and degree of involvement of the proposed experts (15 points).
 - b. Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (15 points).

Tenders scoring less than 65 (of a maximum of 100) points against the technical criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderers to meet the purpose of the contract as described in the technical specifications. To this end, the tenderers must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

Tenderers must submit a full dossier in compliance with these specifications. The technical quality of the bids will be assessed with regard to the ability of the tenderers to meet the purpose of the contract as described in 2.2 and 2.3 above.

Tenderers should explain their conceptual approach for undertaking the study. They should clearly define the required analysis, the issues to be addressed and the nature of the outcome to be achieved. Tenderers should also describe the way in which the analysis will be undertaken (i.e., the various steps envisaged, the documentary efforts to be undertaken, the methodological approach for the collection of data). Tenderers will also be required to provide information about organisational aspects related to the compliance of the contract.

To this regard, tenderers have to present:

- a detailed description of the rationale and conceptual approach underlying the study;

- a complete description of the envisaged methodology and research tools (in particular when it comes to the identification and analysis of relevant national initiatives);
- a comprehensive description of the development stages for the research, including:
 - organisation of the work and management arrangements
 - a timetable with description of the development stages, tasks allocated to the proposed experts and expected deliverables (taking into account 2.4 of the Technical Specifications).

In addition to the above tenderers must clearly specify which parts of the work will be sub-contracted (if any) and the identity of all subcontractors undertaking more than 10% of the work by value as requested in point 4.2 (second paragraph).

5.3 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **total price (a+b)** offered in table 1 – Price schedule table (see point 5.4).

5.4 Financial proposal

The financial proposal should indicate the total price in order to carry out all the activities indicated in the technical specifications. The tenderers must fill in the following table 1 - price schedule table and present a detailed breakdown of the price offered.

Table 1: Price schedule table (*all fields are mandatory*)

	Services	Price
a)	Total price to carry out all the activities	(1) Number of person-days: (2) Price per person-day: Total amount = (1) x (2):
b)	Attending meetings (see point 2.5) (indication of total amount for all the meetings)	
	Total price (a+b) :	

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- Other travel expenses for meetings apart from those mentioned under point 2.5 that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract in Annex B).
- Under Article 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

6 Information on presentation and content of tender

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should note the instructions indicated in the invitation letter of this tender.

In addition, below you will find details of the required documentation.

6.1 Envelope A - Supporting documents

One original and one copy of:

- the checklist found in Annex F;
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in point 3.2;
- the legal entity form found as requested in point 3.3 and found in Annex D;
- a statement containing the name and position of the individual(s) entitled to sign the contract;
- the financial identification form as found in Annex E.

6.2 Envelope B – Technical proposal

One original signed unbound copy and four bound copies of:

- the technical proposal providing all information requested in point 5.2 including information relevant to subcontracting as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed unbound copy and four bound copies of:

- the financial proposal containing all information requested in point 5.4.

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

I hereby declare that neither I nor the company:

(Company Name).....

that I am representing are in any of the situations mentioned below:

- a) is bankrupt or being wound up, is having his/her affairs administered by the courts; has entered into an arrangement with creditors; has suspended business activities; is the subject of proceedings concerning those matters; or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) has been convicted of an offence concerning his/her professional conduct by a definitive judgement;
- c) has been guilty of grave professional misconduct proven by any means which Cedefop can justify;
- d) has 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 he/she is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) has been the subject of a definitive judgement 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, he/she has been declared to be in serious breach of contract for failure to comply with his/her contractual obligations.

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

- is subject to a conflict of interest;
- is 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.

Signature:

Date:

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal status of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/ftiers_en.htm

ANNEX F

CHECKLIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please tick (✓) the boxes provided

<u>Mandatory</u> documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
<u>Envelope 'A' must contain</u> One original and one copy of: this checklist		Yes	No	
		☐	☐	
exclusion criteria declaration (if applicable, including those of consortia and subcontractors)	3.1, 4.1, 4.2 & Annex C	☐	☐	
selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	☐	☐	
legal entity form	3.3 & Annex D	☐	☐	
name and position of the individual(s) entitled to sign contract	3.3	☐	☐	
financial identification form	6.1 & Annex E	☐	☐	
<u>Envelope 'B' must contain</u> one original and four copies of:				
the technical proposal.	5.2	☐	☐	
<u>Envelope 'C' must contain</u> one original and four copies of:				
The financial proposal	5.4 (Table 1)	☐	☐	

You should also ensure that:

☐	Your offer is formulated in one of the official languages of the European Union.
☐	Both the technical and financial proposals of the offer are signed by you or your authorised agent.
☐	Your offer is perfectly legible in order to rule out any ambiguity.
☐	Your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	The outer envelope bears the information mentioned in the invitation to tender point 3.