



Thessaloniki, 10/06/2008
RS/PRO/2008/618

OPEN INVITATION TO TENDER
AO/ECVL/RLAR/GuidanceRestructuring/008/08

**‘Career guidance in restructuring enterprises: designing effective strategies to support
redundant workers’**

Dear Sir/Madam,

We 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 Tender 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 to be dispatched not later than **20/08/2008** 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
Attention of Mr G. Paraskevaidis
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 490028)***

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

- (b)** or by courier service to be dispatched not later than **20/08/2008** in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490111**

(c) or delivered by hand not later than **17h00** on **20/08/2008** to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490 064**

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 9h00 to 17h00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

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

Tenders must be submitted in a sealed envelope itself enclosed within a second sealed envelope. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

The **outer envelope**, addressed simply to Cedefop (address depending on the means of submission, see point 2 above), should only bear additionally **the name and address** of the sender.

The **inner envelope**, addressed to the Procurement Service as indicated under point 2 above, must bear a self-adhesive label with the indication **“Open Invitation to tender – Not to be opened by the internal mail service”** and all the necessary information, as shown below:

OPEN INVITATION TO TENDER CEDEFOP No: AO/ECVL/RLAR/GuidanceRestructuring/008/08 ‘Career guidance in restructuring enterprises: designing effective strategies to support redundant workers’ Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must also contain three sealed envelopes, namely, **Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”**. 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 **02/09/2008, 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 (Fax No +30 2310 490 028) 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 tender documents. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) 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 regularly the site 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 G. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/RLAR/GuidanceRestructuring/008/08

**‘Career guidance in restructuring enterprises:
designing effective strategies to support redundant
workers’**

Tender 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 Norway and Iceland. 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) Title of the contract: **“Career Guidance in restructuring enterprises: designing effective strategies to support redundant workers”**
- b) The purpose of this invitation to tender is to launch a study on the contributions of career guidance and counselling to socially responsible restructuring. In particular, the study will consider how career guidance can be most successfully and cost-effectively delivered to support displaced workers or soon-to-be displaced workers due to restructuring. The study will highlight examples of commendable practice and effective policies in different economic sectors.
- c) Type of contract: Service Contract related to research.

1.2 Place of delivery or performance

The tasks must be completed at the contractor’s premises.

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

Maximum budget available for this activity is **120 000 EUR**.

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least **6 months** following the tender submission date.

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 **12 months**.

1.8 Main terms of financing and payment

Payments will be made within **30 days** of submission of invoices and at the conditions set out in the draft contract.

2 Technical specifications

2.1 Introduction and background:

2.1.1 Introduction: restructuring, both a challenge and an opportunity for Europe

Global competition, technological innovation, shifts in consumer demands are all impacting on companies and workers, and require steady adjustment to manage changes. Restructuring operations are part of this adaptation process to remain competitive. It can even be argued that the dominant question confronting companies is no longer whether but how to restructure.¹

The social costs associated with restructuring can be high, leading to large-scale redundancies, and the decline of particular sectors, or regions affected by a reduction or cessation of operations at a specific location. Workers made redundant in sectors undergoing restructuring risk to experience longer unemployment intervals, because they tend to be older and more likely to have educational qualifications and skills not entirely suited to emerging employment demands². It is therefore required to accompany restructuring in a way that minimises the immediate negative effects on employment, in particular on those already experiencing difficulties in the labour market³.

Restructuring in large companies tends to monopolise the interest of the media, as it can be associated with large scale redundancies and social costs. Still, SMEs represent a considerable proportion of total employment in Europe and a large number are affected by industrial change. Addressing the challenge of socially responsible restructuring thus also depends on stimulating and mobilising SMEs, which often lack the resources, capacity and expertise to offer their workers the full range of options and services in a redundancy situation. More needs to be done to ensure that this vital section of the economy is not ignored and appropriate support and resources are allocated so they can effectively reconvert and redeploy their staff⁴.

Although restructuring has been seen as a negative phenomenon, appropriate policies, instruments and partnerships can reverse the negative impact of restructuring and transform it into the creation of new perspectives in terms of growth and job creation. The importance attached to the negative consequences of restructuring stems from the fact that job losses are visible immediately, whereas most of the benefits appear only after a certain time and are not perceived as direct consequences of restructuring⁵. Restructuring can underpin economic and social progress, on condition that firms can manage the necessary change quickly and effectively, and as long as public action helps ensure that restructuring is carried out in sound conditions⁶. Innovative multi-tiered approaches to restructuring - involving the integration of interrelated educational and business creation measures - have led to job creation and the launch of start-up business by affected employees⁷. In this regard, career guidance can be considered to have a key contribution to make to innovative and socially responsible restructuring strategies.

¹ European Foundation for working and living conditions, EMCC, "Business creation as a result of restructuring processes", 2005, <http://www.eurofound.europa.eu/emcc/content/source/eu06010a.htm>

² Proposal for a Regulation of the European Parliament and the Council "Establishing the European Globalisation adjustment Fund", http://ec.europa.eu/employment_social/egf/index_en.html

³ EQUAL, Emerging lessons and insights on restructuring, September 2006 http://ec.europa.eu/employment_social/equal/data/document/etg3-0609-restruc.pdf

⁴ How dynamic regions face restructuring; the role of the European Social Fund and the other Structural Funds, Restructuring Forum, 3rd meeting 4-5 December 2006.

http://ec.europa.eu/employment_social/restructuring/forum_en.htm

⁵ OECD, Offshoring and employment: trends and impacts, 2007.

⁶ Communication from the Commission, "Restructuring and employment; anticipating and accompanying restructuring in order to develop employment: the role of the European Union", COM (2005) 120 http://www.eu2005.lu/en/actualites/documents_travail/2005/04/05epscom/Communication-EN-FINAL.pdf

⁷ European Foundation for living and working conditions, EMC, "Business creation as a result of restructuring processes", 2005, <http://www.eurofound.europa.eu/emcc/content/source/eu06010a.htm>

2.1.2 Background of this call for tenders: contributions of career guidance to socially responsible restructuring

The present open invitation to tender is issued in the context of the political priority attached at European level to career guidance and counselling in three interlinked policy domains: education, training and employment. For the purpose of this study, career guidance refers to services designed to assist individuals of any age to make occupational, training and educational choices and to manage their careers⁸. By helping people to take career and education decisions that are firmly based, career guidance interventions seem likely to improve transparency of the labour market and ease job transitions. Guidance can thus contribute to a better match between labour supply and demand, as it supports people to achieve a better fit between their talents and qualifications and available working opportunities. The services might be on an individual or group basis, and might be face-to face or at distance (including call centre technologies and web based services), using a wide suite of delivery methods.

It is increasingly acknowledged that career guidance has a major contribution to make to lifelong learning, social inclusion and labour market policies, within the renewed Lisbon strategy (2006) for “more and better jobs”⁹. To support the continual employability of workers, particularly the most vulnerable, help them cope with rapid change and ease transitions to new jobs, flexicurity policies¹⁰ should also include a strong career guidance component. More recently, the Council Resolution on the new skills for new jobs advocates for providing job seekers with career guidance and personal action plans, which should identify the competences required to manage transitions and move to new jobs where there are skills gaps¹¹.

Research on the efficiency of active labour market policies (ALMP) suggest that job search and career guidance measures should be particularly effective when addressed to displaced workers or soon-to-be-displaced workers, and should be provided as part of any policy package to address job loss at restructuring.¹² As a matter of fact, the *European Globalisation Adjustment Fund* supports active employment measures such as career guidance and counselling, as part of an array of personalised support services for displaced workers due to restructuring.

Still, while there is extensive literature on the impact of active labour market policies applied to the unemployed, there are considerable fewer studies and data on the use of these measures for workers displaced through restructuring¹³. It is thus relevant to consider how best career guidance services could be delivered to redundant workers in the context of restructuring, and to identify possible lines of action at local, regional, national and sector levels.

⁸ Council Resolution on strengthening policies, systems and practices in the field of guidance throughout life in Europe, 2004, http://ec.europa.eu/education/policies/2010/doc/resolution2004_en.pdf

⁹ The Helsinki Communiqué on enhanced cooperation in European Vocational Education and Training, http://ec.europa.eu/education/policies/2010/doc/helsinkicom_en.pdf and the Council conclusions on the New Lisbon cycle on 14 March 2008 (7652/08), http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/99410.pdf

¹⁰ Towards common principles of Flexicurity: more and better jobs through flexibility and security, European Commission, DG Employment, Social Affairs and Equal Opportunities, 2007 http://ec.europa.eu/employment_social/employment_strategy/flexicurity%20media/flexicuritypublication_2007_en.pdf

¹¹ Council Resolution of 15 November 2007 on the new skills for new jobs (2007/C 290/01), <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2007:290:0001:0003:EN:PDF>

¹² ERM Restructuring and Employment in the EU: the impact of globalisation, 2007: 75 <http://www.eurofound.europa.eu/publications/htmlfiles/ef0768.htm>

¹³ European Foundation for the Improvement of Living and Working Conditions (ERM), *Restructuring and Employment in the EU: the impact of globalisation*, 2007: 63 <http://www.eurofound.europa.eu/publications/htmlfiles/ef0768.htm>

2.2 General purpose

Against this background, this Call for tenders aims at commissioning a study on the contributions of career guidance and counselling to socially responsible restructuring strategies and policies. In particular, the study will consider how career guidance can be most successfully and cost-effectively delivered to support displaced workers or soon to be displaced workers due to restructuring. The ultimate objective is to gain a better understanding of what works in practice and what conditions need to be put in place to give a broad access to career guidance to affected workers. In considering key success factors and challenges, the analysis will examine effective policies, strategic partnerships, structures, modes of delivery and instruments to best support redundant workers. The study will highlight examples of commendable practice, innovative responses and effective policies in different economic sectors. The contractor will identify and analyse case studies (good practices) that can serve as leading examples for other companies or regions affected by restructuring, policy makers at regional and national level, the social partners, and guidance providers when designing strategies to support redundant workers due to restructuring. While selecting the examples of good practices the contractor will ensure a balanced representation of large companies and SMEs, older and newer Member State in the sample.

2.3 Description of tasks and methodology

2.3.1 Tasks

- The contractor shall undertake an **analysis (research report)** on the contributions of career guidance and counselling to socially responsible restructuring strategies. In particular, the study will consider how career guidance can be most successfully and cost-effectively delivered to support redundant workers. In considering trends, key success factors and challenges, the analysis will consider effective policies, strategic partnerships, structures and modes of delivery to best support redundant workers.
- The contractor shall identify and analyse **25 case studies**, corresponding to 5 economic sectors, which can be considered as examples of good practice. The sample should feature large companies as well as SMEs, low-skilled and high-skilled occupations. A certain geographical balance should be ensured, and a good representation of both older and newer member states. The contractor shall include in the sample innovative initiatives that have been generated with the support of European programmes, such as the European Social Fund (Equal and Article 6), but not limit the analysis to these.
- To the extent possible, these examples of good practice (case studies) should be accompanied by quantitative evidence documenting results achieved. Although the outcomes of career guidance are neither readily visible nor easily measured, and casualty is difficult to assess, the contractor should also consider the perceived or established effects on individual progression through the job market.
- Although the contractor will formulate detailed research issues, in the selection and analysis of examples of good practice, special attention should nonetheless be given to:
 - o Strategies for broadening access to career guidance provision through flexible and differentiated delivery modes to match different levels of needs (e.g. through tiered services, call centre technology, community based delivery, peer guidance and job coaching...).
 - o Initiatives that balance the aim of rapid returns to work (i.e. short-term employment options and immediate educational and occupational choices) and the longer term career development interests of individuals (e.g. customer-related services that look for a maximum enhancement of autonomy and empowerment, and the acquisition of career self-management skills: the ability to make effective career decisions and to implement them);

- o The provision of career guidance to the most vulnerable people in restructuring situations, especially older workers and the low-skilled;
- o Multi-stakeholder partnerships to offer more differentiated responses, in particular the role of the social partners in planning and delivering guidance, and eventually the extent to which career guidance and counselling features on the negotiating table of the collective bargaining;
- o The development of structures and services which are part of wider support packages for affected companies, especially those specifically conceived to allow individual SMEs or groups of SMEs from particular sectors to offer career guidance and other support services to their soon-to-be-redundant employees.
- The contractor will identify **key policy messages**, critical success factors and challenges for the effective delivery of career guidance in the context of restructuring. The study will identify possible lines of action for initiatives at local regional, national and sector levels in support of socially responsible restructuring.

2.3.2 Methodology

- The contractor will undertake a preliminary desk research on the contributions of career guidance to active labour market policies and socially responsible restructuring, as well as the conditions for an effective delivery of guidance (including research reports, evaluations, descriptions and available evaluations of EU funded projects on innovative and socially responsible restructuring). The literature review should consider the below mentioned references but should not be limited to these.
 - o Within the European Social Fund (ESF), both EQUAL and Article 6 programmes, which will cease to exist after 2008, represented a significant test-bed for piloting innovative approaches to managing socially responsible restructuring.
 - o The European Globalisation Adjustment was established by the European Parliament and the Council at the end of 2006 to provide help for people who have lost their jobs due to the impact of major structural changes, when more than 1.000 workers in an enterprise or a regional sector are made redundant. In July, 2008, the European Commission will present a first report of activities.
 - o A number of Public Employment services have set up specialised employment and career guidance initiatives for people soon to be unemployed due to imminent redundancies linked to restructuring (DG Employment, Social Affairs and Equal Opportunities, *Career Guidance in Europe's Public Employment Services*, 2005)¹⁴.
- The analysis of career guidance in restructuring processes will also be founded on qualitative research methods, in particular for the analysis of good examples of practice (i.e. through country visits, interviews with stakeholders, and other means chosen by the contractor to collect primary and in-depth information). As relevant, interviewees may represent institutions involved in planning and delivering career guidance (such as sector organisations, cross-industry social partners, public employment services, career guidance providers) as well as end-users.
- The analysis should focus on 5 relevant sectors to be proposed and justified by the contractor and approved by Cedefop, featuring both blue-collar/low-skilled occupations and knowledge-based/high-skilled sectors.

¹⁴ http://ec.europa.eu/employment_social/employment_strategy/pesguidancereport_en.pdf

- As for the examples of good practice, they should be presented and analysed following a systematic approach. The contractor will design research tools for the collection and analysis of primary and secondary data, in particular, a template for the systematic description and analysis of examples of good practice (case studies). The case studies will provide one of the main sources for the analysis of career guidance in restructuring processes (examples should be embedded in the research report). The examples of good practice should also be presented as a self-standing document.

Considering the complexity of the study, the contractor will be advised to rely on a team of experts. The contractor is advised to assemble the team necessary to execute, manage and coordinate the study.

Throughout the completion of these tasks, the contractor will consult closely with Cedefop's team responsible for guidance.

2.4 Deliverables, timetable and meetings

2.4.1 Deliverables and timetable

An inception report: The report should fine-tune the methodology for identifying and assessing good practice in the field. The report should include a draft outline for the description and analysis of the case studies (i.e. a detailed template). This is due **one month after signature of the contract**.

An interim report, within 5 months of the date of signature of the contract, which will include:

- a preliminary analysis, illustrated with some interesting examples of policies and practices, highlighting intermediary findings;
- a list of potential examples of good practice (case studies) with a justification of choices;
- at least 5 completed examples of good practice (with a detailed description and analysis);
- a short description of the methodology, including the final version of the tools for data collection and analysis;
- a list of data sources, including bibliographical data, reference people and institutions;
- an updated work plan and timetable;
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study.

A draft final report (study), within 8 months of the date of signature of the contract and a final report within 10 months of the date of signature, following the guidelines provided in these Technical Specifications and including:

- an executive summary, highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document;
- a thorough analysis illustrated with examples of effective policies and practices;
- a compilation of 25 good practices that can serve as leading examples in other regions affected by restructuring, accompanied by a brief introduction so it can be distributed also as a self-standing document;
- annexes, such as a bibliography, research tools, and a full description of the methodology.

Cedefop will provide comments on the interim report and the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study (final report).

The Contractor will submit the deliverables in English, in hard copy and in electronic format (Word). The electronic files should correspond fully to the hard copies. Any tables, figures, graphs created should also be made available as separate files and include the data used in order to reproduce the figures.

The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop’s style manual (see Annex F).

2.5 Meeting and Travel expenses requested by Cedefop

The contractor will be requested to attend **three one-day** meetings at Cedefop with the team responsible for lifelong guidance:

- o a kick-off meeting a few weeks after the signature of the contract to fine-tune the research methodology to be applied, the data sources to be used and the final planning, as well as to discuss the inception report;
- o a meeting to discuss the draft interim report, monitor progress and discuss the interim findings and key messages of the study;
- o and a meeting to discuss the draft final report and the key policy messages.

2.6 Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop’s meetings (point 2.5 above) have to be included in the financial offer, point b) of Table 1.

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in points 2.3 and 2.4, have also to be included in the financial offer, point a) – sub total (2) of Table 1.

Any extra travel, accommodation etc expenses besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop’s prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (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 court 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 court 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 tenderers must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

Economic & 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 Tenderer must comply with the following criteria:

- qualifications, knowledge and ability of the contractor and the key expert(s) to perform the tasks outlined in sections 2.3 and 2.4 of these technical specifications;
- extensive professional experience in the specific field of the study, as attested by the CVs and related documentation of the experts proposed;
- solid experience of analysis in the field concerned, including the theoretical and empirical aspects, in particular through transversal and comparative analysis across EU countries and the evaluation of projects;
- sound expertise in qualitative research, in particular in the analysis of case studies;
- and linguistic ability to communicate and draft to a high standard in English.

Evidence of technical and professional capacity

The following documents must be provided as evidence of compliance with the above criteria:

- detailed CV(s) of the Contractor and all members of the study team, with a description of professional experience and research publications related to the study subject, including evidence of experience in comparative studies at European level, and language qualifications;
- list of major contracts/studies performed over the past three years in relevant policy domains with dates, sums, and commissioning authorities;

- description of the measures employed to ensure the quality of services;
- an indication of what proportion, if any, of the contract the tenderer may intend to subcontract (see also point 4.2);
- in the case of consortia, written confirmation from each member of the consortium that they will be ready and willing to participate in the study, and describing their role (see also point 4.1).

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 ensure 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 to 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 groupings (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 bidder's 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 sub-contractor 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 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:

The tenders will be evaluated according to the following criteria and points scored for each criterion. Due to the high level of specialisation required to carry out the study, great weight will be given in the selection process to the general understanding of the context and the nature of the tasks and the study methodology.

- ***Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (30 points)***
 - Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake **(15 points)**;
 - Relevance of the proposal to the objective of the contract, level of understanding of the nature of the work, its context and results to be achieved **(15 points)**.
- ***Award criterion 2 – The quality and relevance of the methodological approach to carry out the work (40 points)***
 - Appropriateness of the methodological approach suggested to carry out the analysis (envisaged steps, research methods and tools, data sources to be used) in accordance with the requirements outlined in these Technical Specifications **(40 points)**.
- ***Award criterion 3 – Appropriateness of organisation and management of the work (30 points)***
 - Organisation of the work, the degree and type of involvement of the proposed experts, allocation of tasks, **(15 points)**;
 - 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 tenderer to meet the purpose of the contract as described in the technical specifications (in 2.2, 2.3 and 2.4 above).

To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above.

For award criterion 1

- a detailed description of the rationale and conceptual approach underlying the completion of the study, including:
 - a brief discussion paper demonstrating in-depth understanding of the subject and the purpose of the contract, with detailed research issues, questions and hypotheses underlying the study.

For award criterion 2

- a detailed description of the envisaged methodology to carry out the study, including
 - a description of the methodological approach and tools for the collection and analysis of data, in particular the identification, selection and analysis of good examples of practice;
 - a duly justified proposal for the sectors to be selected and the countries to be covered (number of countries and geographical coverage);
 - a list of potential data sources to be used and key reference institutions and experts.

For award criterion 3

- a detailed description of the development stages, including:
 - a list of team members together with an explanation of the nature and extent of their participation in the work;
 - a detailed work plan illustrating intended organisation and management of the work, including a timetable, with key milestones and deliverables (please refer to 2.3 and 2.4);
 - a preliminary assessment of likely difficulties in carrying out the work and proposed actions.

In addition to the above the tenderer 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 (sum of sub totals 1+2+3)** offered in table 1 – Price schedule table (see point 5.4). Any tender containing a financial proposal exceeding the maximum budget mentioned in these tender specifications (see point 1.5) will be rejected.

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)	Price to carry out all the activities described in the technical proposal All estimated travel, accommodation etc expenses related to performance of the tasks (<i>indication of total amount</i>)	(I) Number of person-days: (II) Price per person-day: Sub Total (1) = (I) x (II): Sub Total (2) =
b)	Attending 3 meetings of one-day each at Cedefop premises (<i>indication of total amount for all three meetings</i>)	Sub Total (3) =
	Total price: sum of sub totals (1+2+3):	

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- 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, see point 5.4.

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 fully respect the instructions indicated under points 2 and 3 of this open invitation to 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 G
- 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 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 version 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 and four 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 court 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 court 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

PLEASE NOTE:

Please indicate the BIC (Bank Identification Code) in the REMARKS box of the downloaded form.

ANNEX F
CEDEFOP's STYLE MANUAL

ANNEX G

CHECK LIST 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
		Yes	No	
<u>Envelope ‘A’ must contain</u> One original and one copy of: This checklist		☐	☐	
exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	3.1, 4.1 & 4.2	☐	☐	
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 & 4.2	☐	☐	
<u>Envelope ‘C’ must contain</u> one original four copies of:				
The financial proposal	5.4	☐	☐	

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 duly 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.