



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 27/06/08
RS/PRO/2008/697

OPEN INVITATION TO TENDER

AO/ECVL/IEMO/CreditSystems&QualificationsFrameworks/011/08

‘Exploring the relationships between credit systems and qualifications frameworks’

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 **21/08/2008** 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. 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 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 **21/08/2008** 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. Paraskevaïdis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490111**

(c) or delivered by hand not later than **17h00** on **21/08/2008** 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
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 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.

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/ILEMO/CreditSystems&QualificationsFrameworks/011/08 ‘Exploring the relationships between credit systems and qualifications frameworks’ 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 **04.09.2008, 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. Paraskevidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/ILEMO/CreditSystems&QualificationsFrameworks/011/08

‘Exploring the relationships between credit systems and qualifications frameworks’

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: Exploring the relationships between credit systems and qualifications frameworks
- b) The study aims at specifying and clarifying the relationships between credit systems and qualifications frameworks at European, national and sector levels, as well as developing scenarios for a credit and qualifications framework at European level, considering on the one side European Qualifications Framework (EQF) and on the other side the European Credit System for Vocational Education and Training (ECVET) and the European Credit Transfer and Accumulation System (ECTS) for Higher Education.
- c) Type of contract is a service contract.

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 **110.000,00 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

The study aims at specifying and clarifying the relationships between credit systems and qualifications frameworks¹ at European, national and sector levels, as well as developing scenarios for a credit and qualifications framework at European level, considering on the one side European Qualifications Framework (EQF) and on the other side the European Credit Transfer and Accumulation System (ECTS) for Higher Education and the European Credit System for Vocational Education and Training (ECVET). Both instruments, ECTS and ECVET, aim at supporting learners' mobility. ECTS² has been introduced in 1989 for Higher Education within the ERASMUS mobility programme, the European Commission presented on 9 April 2008³ a proposal for a recommendation to the European Parliament and the Council on ECVET that aims at promoting mobility and recognition in VET.

The study should take into account recent research activities undertaken by international and European organisations (OECD, ILO, Cedefop and the European Commission) as well as national research activities on learning outcomes, qualifications, qualifications systems and frameworks, lifelong learning, and modernisation of education and training systems. The study should consider the Cedefop feasibility study on European approaches to credit (transfer) systems in VET (2005), the two studies on the context of European mobility in the area of initial vocational training⁴ as well as the various reports from the Technical Working Group on Credit Transfer in VET. It should also take into account ongoing Cedefop studies on learning outcomes, qualifications and standards (available on request).

2.2 Credit systems and qualifications frameworks: background

Within European VET policy, various European initiatives and instruments have been developed to increase transparency and portability of qualifications across institutional, sectoral and national borders. Promoting learners' and workers' transnational mobility, access to lifelong learning, as well as quality in education are triggers for initiating and developing the European Credit System for Vocational Education and Training (ECVET), the European Credit Transfer and Accumulation System (ECTS), Europass, the European Quality Charter for Mobility (EQCM), the European principles for the identification and validation of non-formal and informal learning⁵ and the European Qualifications Framework for lifelong learning (EQF). Within the European Higher Education Area (EHEA) qualifications frameworks are considered as instruments for comparability and transparency, sustaining higher education institutions in developing modules and study programmes based on learning outcomes and credit, and improving the recognition of qualifications as well as all forms of prior learning (London Communiqué 2007).

The 2007 ECVET consultation process provides evidence of the users' needs on clarification of links between ECVET, EQF and ECTS; this aspect has been raised by the Ministries in charge of education and training, as well as many stakeholders engaged in the education and training systems or in the labour market. The European University Association (2007⁶) urged for a common Qualifications

1 The EQF Recommendation distinguishes between 'National qualifications system' and 'National qualifications framework' in the following way: 'National qualifications system' means all aspects of a Member States' activity related to the recognition of learning and other mechanisms that link education and training to the labour market and civil society. This includes the development and implementation of institutional arrangements and processes relating to quality assurance, assessment and the award of qualifications. A national qualifications system may be composed of several subsystems and may include a national qualifications framework; 'National qualifications framework' means an instrument for the classification of qualifications according to a set of criteria for specified levels of learning achieved. Source: Recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the European Qualifications Framework for lifelong learning

2 For further information, please consult: http://ec.europa.eu/education/programmes/socrates/ects/index_en.html.

3 For further information, please consult: http://ec.europa.eu/education/policies/educ/ecvet/index_en.html.

4 ECVET Reflector (<http://www.ecvet.net/c.php/ecvet/index.rsys>); ECVET Connexion (<http://www.ecvetconnexion.com/>)

5 Commission of the European Communities (2004), Conclusions of the Council and of the representatives of the Governments of the Member States meeting within the Council on Common European Principles for the identification and validation of non-formal and informal learning, 9600/04 EDUC 118 SOC 253, 18 May

6 EUA (2007). Lisbon declaration. Brussels.

Framework and a common credit system to avoid problems in implementation at national level and confusion among actors on the ground.

Looking at the recommendation on a European Qualifications Framework for lifelong learning (23 April 2008) as well as the proposal for a recommendation on the establishment of the European Credit system for Vocational Education and Training (09 April 2008)⁷ credit systems and qualifications frameworks appeared to be interweaved. The EQF recommendation mentions the development of “close links between the European Qualifications Framework and existing or future European systems for credit transfer and accumulation in higher education and vocational education and training, in order to improve citizens’ mobility and facilitate the recognition of learning outcomes”. The ECVET proposal refers to the cross-referencing of EQF and ECVET as both instruments share similar concepts and principles. The implementation of ECVET includes: specifying the units of learning outcomes using the EQF levels, reaching agreement between the Memorandum of Understanding’s partners upon the comparability of qualifications, for the purposes of credit transfer, using EQF to establish the reference levels proposal, and establishing the comparability of qualifications in case of non-formally acquired learning outcomes by referencing them to equivalent EQF level⁸.

During one of the first conferences prior to EQF (Glasgow, 2005), VET and HE experts and policy makers gathered to discuss on qualifications frameworks in Europe and stated: ‘The ability to support credit transfer and accumulation is a criterion for the success of the EQF. Credit had implications for the design of the EQF [...] the tension between a simple model based on levels, outcomes and quality assurance, and the need to coordinate with other developments including credit and the recognition of prior learning’ (Raffe 2005⁹). Meanwhile discussion and research activities are focusing on the learning outcomes approach in VET and HE (Cedefop 2008¹⁰). Qualifications frameworks and credit systems can be assigned different roles in relation to flexibility and responsiveness of qualifications systems, learners’ motivation, linking labour market and education, opening access to qualifications, assessment procedures, transparency of qualifications, funding and efficiency of qualifications systems, management of qualifications systems (Werquin 2008¹¹).

While the main objective of EQF is to increase the transparency, comparability and portability of acquired qualifications, ECVET should facilitate the transfer, recognition and accumulation of learning outcomes of individuals on their way to achieving a qualification. A closer look at national developments reveals a steady trend over the last ten years towards modularisation of education and training programmes and the introduction of units of assessment that lead to qualifications. However modularisation does not seem to deliver sufficient transferable credit for individuals, and may provide inadequate or unreliable information for employers to make decisions about recruitment and training needs. Hence many countries are looking at ways of introducing credit transfer processes (and thus flexibility) into the qualifications systems. Belgium [Flemish Community], Denmark, Sweden, Spain, Scotland, and New Zealand (for instance) have developed or are exploring the development of credit transfer systems (OECD 2007¹²). In the United Kingdom, a Qualifications and Credit Framework (QCF) for the three countries of England, Wales and Northern Ireland will be implemented starting August 2008. Ireland is currently assessing its National Framework of Qualifications linking it to policies on transfer and progression. The Australian qualifications framework already foresees formal linkages between qualifications belonging to different parts of the education and training systems based upon articulation and credit transfer arrangements (AQF 2007¹³).

7 Commission of the European Communities. *Proposal for a recommendation of the European Parliament and the Council on the establishment of the European Credit system for Vocational Education and Training (ECVET)* [SEC(2008) 442 SEC(2008) 443]. COM(2008) 180 final, 2008/0070 (COD), Brussels, 9.4.2008

8 Op. cite

9 Raffe, David. *Qualifications frameworks in Europe: learning across boundaries*. Report of the Glasgow Conference, 22-23 September 2005, November 2005, Scottish Executive, Edinburgh.

10 Cedefop. *The shift to learning outcomes - Conceptual, political and practical developments in Europe*. Luxembourg: Publications Office, 2008.

11 Werquin, Patrick. Moving mountains: will qualifications systems promote lifelong learning? in *European Journal of Education*, 2007, Vol. 42, No. 4, 2007, pp.459-484.

12 OECD. *Qualifications Systems. Bridges to lifelong learning*, 2007, Paris.

13 Australian Qualifications Framework (AQF) Advisory Board. *Australian Qualifications Framework: implementation handbook*. 2007, Fourth Edition, Carlton South Vic 3053

Credit systems are currently further developed in the context of national initiatives, feasibility studies, testing in specific qualifications or amending national legislation, as well as within the European programmes for vocational education and training and pilot projects. The award of qualifications is based, in some qualifications systems, on the accumulation of units of learning outcomes either associated with credit points (United Kingdom, Finland, Sweden, etc.) or without credit points (France, Spain, etc.). Credit systems are sometimes developed within a broader qualifications framework (Scottish and Welsh credit and qualifications framework) or designed for specific qualifications (IFTS system in Italy) (Commission of the European Communities 2008¹⁴). Qualifications systems are also evolving thus concentrating on facilitating access to qualifications and transfer of learning outcomes. Many Member States have engaged into implementing the European qualifications framework and developing national qualifications frameworks including the referencing of their qualifications to the EQF (Commission of the European Communities 2007¹⁵). Credit systems and qualifications frameworks (Young 2007¹⁶) are characterised by diversity of patterns and purposes. The two existing European credit systems for education and training (ECVET and ECTS) are differently linked to qualifications framework (resp. EQF and HE-QF). As shown above, at national levels, few qualifications systems have already implemented qualifications and credit frameworks. Some national qualifications systems have or are implementing qualifications frameworks. A vast majority of higher education institutions are using ECTS for transfer and accumulation. Most qualifications systems in Europe show a high level of ECVET readiness¹⁷ if one considers specific aspects like units and learning outcomes, transfer and accumulation, and a proliferation of unified national lifelong learning frameworks based on credits and common methodological approaches employing learning outcomes can be expected (Cedefop 2008¹⁸).

2.3 Objectives, tasks and methodology

The study's objectives should be considered in the context of national developments and in the context of the European Education area (incl. the Bologna and the Copenhagen processes). The study should reflect and deal critically with on-going developments at national and European levels on credit systems or similar mechanisms, qualifications frameworks as well as the relationships between credit systems and qualifications frameworks. It includes identifying the rationales for further development of qualifications and education systems (for instance mutual trust).

The contractor should carry out the following tasks:

1. Produce an overview on the state-of-play of credit systems and qualifications frameworks in 6 to 8 selected European countries (rationales, achievements, implementation strategies, on-going reforms, etc.) as well as 2 non-European countries (for instance Australia, South Korea or South Africa);
2. Research and analyse the relationships between credit systems and qualifications frameworks, their rationales and their implications for qualifications and VET systems taking into account different patterns of integration depending on the development of credit systems and qualifications frameworks at national and sector level. This includes identifying the advantages and drawbacks of such a link in terms of progression routes and flexibility for the learner, of administrative and regulatory arrangements for the competent bodies, focusing on the accumulation function of credit systems (regulation, legislation, institutional background conditions);
3. Develop a set of scenarios identifying drivers, challenges and choices for developing and implementing a European credit and qualifications framework.

¹⁴ Op. cite

¹⁵ Commission of the European Communities. *Accompanying document to the Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions. "Delivering lifelong learning for knowledge, creativity and innovation"* Draft 2008 joint progress report of the Council and the Commission on the implementation of the "Education & Training 2010 Work Programme" {COM(2007) 703 final}

¹⁶ Young, Michael. Qualifications frameworks: Some conceptual issues. ? in *European Journal of Education*, Vol. 42, No. 4, 2007, pp.445-457.

¹⁷ ECVET reflector, ECVET connexion

¹⁸ Op. cite

Analysing the relationships between credit systems and qualifications frameworks implies reflecting upon their necessity for the dynamics of education/qualifications systems and labour markets, exploring forms and ways of integration as well as the consequences in terms of transition and progression for learners, of articulation and portability of qualifications. The following aspects should be considered while carrying out the study:

- a) What is the use and role of qualifications frameworks in the different phases of the transfer and accumulation processes linked to credit systems? Which could be the requirements set to qualifications frameworks to allow for assessment, validation and recognition of learning outcomes? How could other instruments or procedures be in/of use in that context?
- b) Which are the impacts of relating credit systems and qualifications frameworks upon levels of credits/units, and levels of qualifications? EQF is conceived as an enabling framework based upon a set of descriptors, how could those descriptors be used for qualification designs enabling credit systems implementation?
- c) Which might be the use of credits for establishing closer links between qualifications? What are the implications of crediting achieved learning outcomes for the definition of common units to different qualifications? How far do/might forms and levels of integration influence the design of qualifications or cross sector qualifications in terms of transferable competences, specialities, trades, sectors?
- d) To which extent does the articulation of units, credits and qualifications as in ECVET, ECTS and EQF influence upon integrating credit systems and qualifications frameworks?

The study should follow an *explorative and qualitative, multi-disciplinary* approach, abstracting from European, national and sectoral developments in Vocational Education and Training as well as Higher Education. Analysis of recent policy decisions (and reports), international and national literature as well as research reports should be carried out (desk research). The empirical analysis should include interviews in a *selected set of 8 to 10 countries* particularly relevant to the objectives of the study. Relevant on-going projects in the field of ECVET, EQF and validation should be considered in the study. The study should draw *a set of scenarios* for a European credit and qualifications framework.

2.4 Deliverables and timetable

Cedefop addresses with this study the European policy makers, practitioners as well as national/sector decision and policy makers, and the research community. It develops scenarios on the linkages between EQF and ECVET/ECTS, and on possibilities to develop a European credit and qualifications framework thus responding to queries during both EQF and ECVET consultation phases in 2006 and 2007. It allows considering the impetus of European VET and HE policy upon the development of education and training systems. It contributes to identify risks and opportunities for the development of qualifications systems and the European education area arising from closely relating credit systems and qualifications frameworks at European level and of integrating credit systems and qualifications frameworks at national and sector level. Furthermore it promotes research on core concepts such as portability and articulation of qualifications, transition/progression within learning pathways.

- An **inception report** should be delivered following the kick-off meeting with Cedefop representatives.
- A **draft interim report**, presenting the findings from the desk based research, should be delivered **4 months** following the signature of the contract. Following comments by Cedefop, a final interim report should be delivered **5 months** following the signature of the contract. The interim report should be the basis for developing the interviews guideline and the scenarios.
- The main deliverable will be the **final report** (+/- 100 pages). A draft final report should be delivered **8 months** following the signature of the contract and the final report after **10 months**.

The final report will reflect the comments mentioned above. The contractor shall submit all deliverables in English, in hard copy and in electronic format. Figures and tables should be delivered separately in Excel or in Word, as appropriate. Excel charts should include the data used to be able to reproduce the charts. The electronic files must correspond fully to the hard-copy version. Lay-out and format of the text –in particular for citation, bibliography, tables and figures – have to comply with Cedefop’s style manual (Annex F).

2.5 Meeting and travel expenses requested by Cedefop

The contractor should be prepared to visit Cedefop **for a kick-off meeting (one working day), and two additional meetings in the course of the contract (one working day each) as follows:**

- ✓ a kick-off meeting will be organised by Cedefop within few weeks after the contract is signed. The meeting will agree on the methodological approach and other necessary clarifications;
- ✓ a meeting will concentrate on scenario developments;
- ✓ a meeting will concentrate on the draft final report.

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 the technical specifications, 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.

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 provide evidence of technical and professional capacity and must therefore comply with the following criteria:

- Qualifications, knowledge, skills and ability to perform the tasks outlined in the technical specifications;
- Extensive professional experience and experience in the field of credit systems and qualifications frameworks;
- Extensive experience in comparative analysis at international level;
- Capacity to access data and expertise at national and European level;
- 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, 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, sums and commissioning authorities;
- Description of 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).

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:

- ***Award criterion 1 - The level of understanding of the nature of the assignment, its context and results to be achieved (50 points)***
 - The level of overview and understanding of qualifications systems and qualifications frameworks, in particular at national level (15 points)
 - The level of overview and understanding of credit systems and their developments (15 points)
 - The level of overview and understanding of qualifications development (especially unit-based qualifications), assessment, validation and recognition processes (20 points)
- ***Award criterion 2 - The quality and appropriateness of the methods suggested to carry out the work (30 points)***
 - The level of understanding of the research challenges (conceptual and methodological) implied in the assignment (10 points)
 - Relevance and appropriateness of the methods proposed, e.g. terminology issues, methodology for data collection and analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (10 points)
 - Explanation of the rationales of the countries' selection (10 points)
- ***Award criterion 3 - The organisation and management arrangements (20 points)***
 - Allocation of tasks, type and degree of involvement of the proposed experts (10 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 (10 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.

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

- discussion of the subject demonstrating in-depth understanding of
 - qualifications developments;
 - assessment, validation and recognition processes;
 - the learning outcomes approach in education and training;
 - the nature and potential challenges implied in the development and implementation of qualifications frameworks as well as credit systems.

For award criterion 2

- prior assessment of the research challenges - conceptual and methodological – implied by the assignment;
- detailed description and explanation of the rationales for proposing specific approach and methods concerning:
 - the methodology selected for case studies, scenario developments and SWOT analysis;
 - the countries' selection;
 - the potential data sources to be used.

For award criterion 3

- detailed work plan illustrating intended organisation, milestones and management of the task including:
 - explanation of the nature and extent of the team members participation in the study;
- preliminary assessment of likely difficulties in carrying out the work, proposed actions required to meet these and proposed time-table with descriptions of the deliverables.

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	Prices (VAT excluded)
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 (indication of total amount)	(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 (indication of total amount for all three meetings)	Sub Total (3) =
	Total price: sum of sub totals (1+2+3):	

The above prices are VAT excluded. Please indicate additionally the applicable VAT percentage:.....%.

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.

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 version 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
<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	☐	☐	
- 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 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.