


**CEDEFOP**

 European Centre for the Development  
of Vocational Training

 Thessaloniki, 15/09/2009  
RS/PRO/2009/747

# OPEN INVITATION TO TENDER

AO/ECVL/ILEMO/Credits&amp;Permeability/017/09

**"From credit systems to permeability in education and training"**
**Contract Notice: 2009/S 176-253033 of 12/09/2009**

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 **preferably** in English, or in one of the official languages of the European Union (see point IV.3.6 of the contract notice).
2. Tenders may be submitted exclusively in one of the following ways:

(a) by post to be dispatched not later than **23/10/2009**, 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](mailto: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.*

**Do not attach your offer to the confirmation e-mail or fax.**

or

(b1) by courier service to be dispatched not later than **23/10/2009**, in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip,

or

(b2) delivered by hand not later than **17h00 on 23/10/2009**, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

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 / 490 064**

Please note that 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 and attached in Annex G:

|                                                                        |
|------------------------------------------------------------------------|
| <b>OPEN INVITATION TO TENDER</b>                                       |
| <b>CEDEFOP No: AO/ECVL/ILEMO/Credits&amp;Permeability/017/09</b>       |
| <b>"From credit systems to permeability in education and training"</b> |
| <b>Name of tenderer:</b>                                               |
| <b>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</b>                   |

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 two 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. **It is a mandatory requirement for the tenderer to include in the offer a cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award. The absence of this signed cover letter will lead to rejection of the offer.**
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 **06.11.2009, 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).

**Requests for additional information/ clarification should be received by 15/10/2009 the latest. No such requests will be processed after that date.**

▪ 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. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
  9. 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.
  10. 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.
  11. Tenderers are informed that for the purposes of safeguarding the financial interest of the Communities, their personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel and/or to the European Anti-Fraud Office (OLAF).  
Data of economic operators which are in one of the situations referred to in Articles 93, 94, 96(1)(b) and 96(2)(a) of the Financial Regulation may be included in a central database and communicated to the designated persons of the Commission, other institutions, agencies, authorities and bodies mentioned in Article 95(1) and (2) of the Financial Regulation. This refers as well to the persons with powers of representation, decision making or control over the said economic operators. Any party entered into the database has the right to be informed of the data concerning it, upon request to Cedefop's Head of Finance and Procurement.
  12. Evaluating your tender and your possible subsequent replies to questions, in accordance with the specifications of the invitation to tender will involve the recording and processing of personal data (such as your name, address and CV). Such required personal data will be processed by Cedefop's Finance & Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Community institutions and bodies and on the free movement of such data. You are entitled to obtain access to your personal data on request and to rectify any such data that is inaccurate or incomplete. If you have any queries concerning the processing of your personal data, you may address them to the Head of Finance & Procurement Service. You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.
  13. 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/ILEMO/Credits&Permeability/017/09**

**“From credit systems to permeability in education  
and training”**

**Tender Specifications**

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| Annex A: | Contract Notice                                                                                  |
| Annex B: | Draft contract                                                                                   |
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| Annex G: | Label information for the inner envelope                                                         |
| Annex H: | Cedefop's Style Manual                                                                           |

## Introduction to Cedefop

- 1) Founded in 1975 <sup>(1)</sup> and based in Greece since 1995, the European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union (EU) supporting European vocational education and training (VET) policy development. Its strategic objective for 2009-11 <sup>(2)</sup> is to ‘contribute to excellence in VET and strengthen European cooperation in developing, implementing and evaluating European VET policy’.
- 2) This strategic objective is supported by four priorities, namely:
  - (a) informing European VET policies;
  - (b) interpreting European trends in and challenges for skills, competences and learning;
  - (c) assessing VET’s benefits;
  - (d) raising the profile of VET.
- 3) Cedefop supports the European Commission, Member States (as well as the associated countries of Iceland and Norway) and social partners by:
  - (a) using its expertise, gathered through research, analysis and networking, to identify trends and challenges and propose ideas for VET policies;
  - (b) bringing together policy-makers, social partners, researchers and practitioners to share ideas and debate proposals on the best ways to tackle the challenges we face;
  - (c) encouraging European approaches, principles and tools to improve training and achieve common aims;
  - (d) raising awareness and understanding of how vocational education and training is evolving, and how it contributes to lifelong learning and other policies;
  - (e) disseminating information through websites, publications, networks, study visits, conferences and seminars.

Cedefop carries out its role through the tasks set out in its founding regulation. It disseminates information through its website, publications, networks, study visits, conferences and seminars.

- 4) Cedefop’s web portal [www.cedefop.europa.eu](http://www.cedefop.europa.eu) includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.
- 5) Information about Cedefop’s publications, many of which can be downloaded, can be found at the Cedefop bookshop at [http://www.trainingvillage.gr/etv/Information\\_resources/Bookshop/list.asp](http://www.trainingvillage.gr/etv/Information_resources/Bookshop/list.asp) Cedefop’s wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

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<sup>(1)</sup> Council Regulation of 10 February 1975 establishing a European Centre for the Development of Vocational Training (Cedefop) EEC No 337/75, Official Journal of the European Communities L39, 13.2.1975 as last amended by Council Regulation EC No. 2051/2004.

<sup>(2)</sup> Cedefop, *Enhancing European cooperation in vocational education through evidence and expertise: continuity, focus and flexibility: Cedefop’s medium-term priorities 2009-11*.

## 1 Overview of this tender

### 1.1 Description and type of the contract

- a) The aim of this invitation to tender is to commission a study addressing permeability and progression in education and training in the context of lifelong learning policies and strategies at European and national level. The study aims at identifying and analysing the mechanisms, forms and rationales for permeability and progression with a specific focus on credit systems in use in Vocational Education and Training and Higher Education. The study will elaborate a set of conclusions to inform European and national policy and research.
- b) Type of contract: Service contract

### 1.2 Place of delivery or performance

The tasks must be completed externally.

### 1.3 Division into lots

This invitation to tender **is not** divided into Lots.

### 1.4 Variants

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

### 1.5 Value or quantity of purchase

Maximum budget available for this activity: **200.000,00 €**.

### 1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at **least 6 months** following the deadline of submission of tenders, i.e. until **23/04/2010**.

### 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 **24 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 purpose of this study is to research and analyse the issue of permeability<sup>3</sup> and progression in education and training in the context of lifelong learning strategies and policies at national and European level. It is embedded in the current development and implementation of qualifications frameworks with a specific focus on credit systems within education and training in Europe. The study aims at identifying and analysing the mechanisms, forms, rationales as well as obstacles to enabling flexible learning paths. It will also take into account the issues of trust, partnerships and institutional set-up in education and training.

The study should build upon the substantial work already undertaken on learning pathways, and qualifications systems in recent years by the OECD, Cedefop and the European Commission<sup>4</sup>. It should also take into account ongoing Cedefop studies on learning outcomes, qualifications standards, credit systems and qualifications frameworks. The results of existing research should be used to provide an overview in this field and to systematically reflect on dynamics of permeability and progression.

#### 2.1.1 The Copenhagen and Bologna processes

Since the Lisbon Declaration (March 2000), much progress has been made in developing national lifelong learning strategies, modernising Vocational Education and Training (VET) as well as Higher Education (HE). However, the recent informal meeting of Ministers for Education<sup>5</sup> (Prague, 23 March 2009) still calls for promoting lifelong learning and supporting further education and retraining. Within the Copenhagen process the issue of permeability has been on the agenda since the VET ministers called in the corresponding Declaration<sup>6</sup> for “investigating how transparency, comparability, transferability and recognition of competences and/or qualifications ... could be promoted by developing reference levels, common principles for certification, and common measures, including a credit transfer system for vocational education and training”, thus formally initiating the processes leading to the Recommendation for the European Qualifications Framework for lifelong learning (EQF)<sup>7</sup> and the Recommendation for the European Credit system for Vocational Education and Training (ECVET)<sup>8</sup>. The recent Bordeaux Communiqué<sup>9</sup> defines as priority the further development of permeability and continuity of learning paths between VET, general education and higher education to reach for excellence and quality of VET system, it also underlines the need for enabling “flexible career paths that may be adapted to citizens’ needs throughout their lives, efforts should be made to forge closer links between all forms and contexts of learning (...) facilitating paths enabling people to progress from one level of qualification to another by strengthening the links between general education, VET, higher education and adult learning”.

The Bologna declaration<sup>10</sup> introduced the notion of access in terms of “entrance to Higher education should be facilitated for diverse groups and at different times of their lives”. Since 2003 and the Berlin Communiqué<sup>11</sup>, lifelong learning paths “into and within higher education” have regained momentum.

<sup>3</sup> Working definitions of those terms can be found in: Cedefop 2008. Terminology of European education and training policy. A selection of 100 key terms. Luxembourg: Office for Official Publications of the European Communities. [http://www.cedefop.europa.eu/etv/Upload/Information\\_resources/Bookshop/369/4064\\_en.pdf](http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/369/4064_en.pdf)

<sup>4</sup> See the quotations in this document

<sup>5</sup> Czech Presidency Communiqué: Eight points for the recovery of Europe from the perspective of Ministers responsible for Education. <http://www.eu2009.cz/scripts/file.php?id=24148&down=yes>

<sup>6</sup> [http://ec.europa.eu/education/pdf/doc125\\_en.pdf](http://ec.europa.eu/education/pdf/doc125_en.pdf)

<sup>7</sup> Recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the European Qualifications Framework for lifelong learning. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

<sup>8</sup> Recommendation of the European Parliament and of the Council of 17 April 2009 on the establishment of a European Credit System for Vocational Education and Training (ECVET). <http://register.consilium.europa.eu/pdf/en/08/st03/st03747.en08.pdf>

<sup>9</sup> [http://ec.europa.eu/education/lifelong-learning-policy/doc/bordeaux\\_en.pdf](http://ec.europa.eu/education/lifelong-learning-policy/doc/bordeaux_en.pdf)

<sup>10</sup> [http://ec.europa.eu/education/higher-education/doc1290\\_en.htm](http://ec.europa.eu/education/higher-education/doc1290_en.htm)

<sup>11</sup> [http://www.bologna-bergen2005.no/Docs/00-Main\\_doc/030919Berlin\\_Communique.PDF](http://www.bologna-bergen2005.no/Docs/00-Main_doc/030919Berlin_Communique.PDF)

The 2007 London stocktaking report shows that “elements of flexible learning exist in most countries, but a more systematic development of flexible learning paths to support lifelong learning is at an early stage ... only in a small number of European Higher Education Area countries could the recognition of prior learning for access and credits be said to be well developed”. The three dimensions of lifelong learning in the European Higher Education policy development can be identified as access, flexibility and recognition. In their Charter on Lifelong Learning<sup>12</sup> the European universities committed themselves to embedding concepts of widening access and lifelong learning in their strategies as well as (among other elements), to developing partnerships at all levels to provide relevant programmes and acting as role models of lifelong learning institutions.

The Copenhagen and the Bologna processes are both supportive of better permeability between vocational and higher education, recognition of prior learning as a prerequisite for more permeability and progression, establishing credit systems (ECVET and ECTS respectively) and qualifications frameworks (EQF and EHEA-QF respectively). The Helsinki Communiqué (2006<sup>13</sup>) and more recently the Bordeaux Communiqué (2008) called for developing consistency between ECVET and ECTS. The Recommendation for a European Qualifications Framework for lifelong learning (EQF, 2008) and the development of national qualifications frameworks (NQF<sup>14</sup>) have correlated effect on the attention paid to the learning outcomes approach in VET and HE. As stated in the relevant Recommendation, the EQF is compatible with the framework for the European Higher Education Area (EHEA-QF) and cycle descriptors agreed in May 2005 within the framework of the Bologna process. The strong support given to EQF and ECVET by national authorities and by social partners signals acceptance of the need for comparison and transfer of qualifications. Most importantly the rapid development of NQF all over Europe shows that countries now are reconsidering the way qualifications and qualifications systems operate and are managed. The expected skills’ demand on the labour market also calls for changes in qualifications with an increasing demand for medium and higher level qualifications.

### 2.1.2 *The nature of permeability*

This need is not less growing out of the necessity to cope with demographic changes and the swift to a knowledge or service society model. The students’ population is changing with mature and non-traditional students entering education and there is an increased demand for vocationally oriented education and training at tertiary level which might lead to the involvement of universities into the field of VET. In the meantime, “by making vocational degrees – at least formally – comparable or parallel to university degrees, vocational education becomes a real alternative to university education. The boundaries between the different sectors of provision in HE, VET and continuous education are blurring. Students may be tempted to enrol in non-university HE, if the programmes are perceived as more student-centred” (Dunkel et al 2009<sup>15</sup>). Available data<sup>16</sup> suggest that most new entrants into higher education until now follow traditional routes. The share of students from non-traditional routes entering higher education stood at 15% in England and Wales, but amounted to less than 12% in other countries (for which data are available). The largest share of students who entered HE via non-traditional routes in Europe is found in Sweden, Spain and Scotland with almost or more than 30%. Which paths are defined as non-traditional depends on national education system and differs between countries. Meanwhile the post secondary non tertiary programmes introduced into universities and other programmes might widen the need for credits and render acute the question of permeability between VET and HE.

Permeability is linked to transferability of learning outcomes, education and training paths or education and training pathways - which are the core of the development of credit systems. European projects such

<sup>12</sup> [http://www.eua.be/fileadmin/user\\_upload/files/Publications/European\\_Universities\\_Charter\\_on\\_Lifelong\\_learning.pdf](http://www.eua.be/fileadmin/user_upload/files/Publications/European_Universities_Charter_on_Lifelong_learning.pdf)

<sup>13</sup> 2006/C298/05 of 8 December 2006, <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2006:298:0008:0011:EN:PDF>

<sup>14</sup> ‘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. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

<sup>15</sup> [http://www.cedefop.europa.eu/etv/Upload/Projects\\_Networks/ResearchLab/ForthcomingReport/Volume-2/05-Dunkel.pdf](http://www.cedefop.europa.eu/etv/Upload/Projects_Networks/ResearchLab/ForthcomingReport/Volume-2/05-Dunkel.pdf)

<sup>16</sup> Eurostat 2009. The Bologna Process in Higher Education in Europe. Key indicators on the social dimension and mobility. Luxembourg.

as BeFlex<sup>17</sup> or HE\_Leo<sup>18</sup> provide first overviews over a limited number of countries, of instruments, or mechanisms, allowing for permeability which include linkage of course types with types of learning outcomes, recognition of prior learning through learning outcomes, bridges between different forms of provision, credit transfer arrangements, etc. A first Cedefop expert workshop concluded that partnerships and institutional agreements are important arrangements enabling permeability and progression, along with credit systems, qualifications linkages or the common design of vertical and horizontal learning pathways. This outcome illustrates and confirms overviews established by OECD, Cedefop or the European Commission in previous research activities<sup>19</sup>. It should be noted that “there are (...) very few structural 'dead ends' within initial VET systems, although progression can still be difficult (...) Systems are generally structured to permit horizontal transfer and also vertical progression for VET students (...) to higher levels of VET or into academic streams”<sup>20</sup>. Implementing permeability in education and training depends on tools and mechanisms linked to transfer, validation and recognition of learning outcomes but also on overcoming institutional path dependencies and mindsets. The European tools and principles for Education and Training do already impact on the understanding of qualifications and have prompted developments at national levels of schemes for validation of non-formal and informal learning and of quality assurance schemes (Cedefop 2009<sup>21</sup>).

One major instrument to enable learners' progression within education and training is credit system. The recent Recommendation for ECVET<sup>22</sup> states that “this Recommendation should facilitate the compatibility, comparability and complementarity of credit systems used in VET and the European Credit Transfer and Accumulation System (“ECTS”), which is used in the higher education sector, and thus should contribute to greater permeability between levels of education and training, in accordance with national legislation and practice.” Credit systems have the potential to facilitate pathways from VET to HE (and vice-versa) if the learning (and hence the credit) is at the desired level of NQF.<sup>23</sup> Realising this potential will depend on the learning outcomes fulfilling their potential as a neutral currency that, when linked to credits, can provide a seamless link between VET and higher education.

NQF are one of a series of policy instruments that can create stronger links between the two education segments, they introduce a set of levels which shows the relationship between qualifications from different sub-systems and sectors. The developments of NQF and the wide spreading of credit and validation arrangements challenge the referencing and anchoring of qualifications. In this context, the qualifications referred to EQF level 5 represented a specific challenge. The EQF Level 5 is bound to be a level of reference for qualifications issued by providers and education/training institutions belonging to VET and/or HE. As mentioned in the EQF recommendation, “The descriptor for the higher education short cycle (within or linked to the first cycle), developed by the Joint Quality Initiative as part of the Bologna process, corresponds to the learning outcomes for EQF level 5”<sup>24</sup>. In some countries intermediate qualifications within the first cycle can be linked to EQF level 5, since the descriptors of the short cycle are also basically consistent with this EQF reference level<sup>25</sup>. The EQF level 5 is

<sup>17</sup> <http://www.eucen.org/BeFlex/index.html>

<sup>18</sup> [http://www.he-leo-project.eu/he\\_leo-handbook/processes\\_and\\_practices/](http://www.he-leo-project.eu/he_leo-handbook/processes_and_practices/)

<sup>19</sup> For instance: Cedefop 2009. Fourth report on vocational training research in Europe: background report. Luxembourg: EUR-OP (2009) (Cedefop Reference series). [http://www.cedefop.europa.eu/etv/Projects\\_Networks/ResearchLab/forthcoming.asp](http://www.cedefop.europa.eu/etv/Projects_Networks/ResearchLab/forthcoming.asp); OECD 2007. Qualifications systems. Bridges to lifelong learning. Paris; this study indicated that the closer links between VET and Higher Education was a feature of many national policy strategies and developments; ECOTEC 2008. Beyond the Maastricht Communiqué: developments in the opening up of VET pathways and the role of VET in labour market. Consolidated Final Report. [http://ec.europa.eu/education/more-information/doc/vetreport\\_en.pdf](http://ec.europa.eu/education/more-information/doc/vetreport_en.pdf)

<sup>20</sup> ECOTEC, Op. cite

<sup>21</sup> Cedefop 2009. Continuity, consolidation and change. Towards a European era of vocational education and training. Cedefop Reference series; 73. Luxembourg: Office for Official Publications of the European Communities. [http://www.cedefop.europa.eu/etv/Upload/Information\\_resources/Bookshop/528/3055\\_en.pdf](http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/528/3055_en.pdf)

<sup>22</sup> <http://register.consilium.europa.eu/pdf/en/08/st03/st03747.en08.pdf>

<sup>23</sup> Cluster on Recognition of Learning Outcomes - Peer Learning Activity Berlin 15-16 June 2009. National Qualifications Frameworks - bridges between HE & VET in terms of learning outcomes. Background paper. Mimeo.

<sup>24</sup> European Commission 2008. Education and Culture 2008. The European Qualifications Framework for lifelong learning (EQF) [http://ec.europa.eu/education/policies/educ/eqf/eqf08\\_en.pdf](http://ec.europa.eu/education/policies/educ/eqf/eqf08_en.pdf)

<sup>25</sup> Federal Ministry of Education, Science and Culture 2006. Europäischer Qualifikationsrahmen – EQF im Kontext der tertiären Bildung. Analyse auf der Grundlage eines ausgewählten Ländervergleichs. European Qualifications Framework – EQF in the Context of Tertiary Education Analysis based on a comparison of selected countries. <http://www.equi.at/pdf/ihs-duk-efq-lassnigg-vogtenhuber-pellert-cendon.pdf>

undoubtedly a challenging item for education and training comparative analysis on permeability as it includes overlaps between vocational education/training and higher education<sup>26</sup>.

## 2.2 General purpose

Permeability is quoted in Cedefop Policy progress report<sup>27</sup> as a perennial issue of education and training policies and practices. In the current invitation to tender, permeability and progression should be viewed from VET to HE, within VET and from HE to VET, at institutional and individual level. Credit systems, qualifications frameworks, partnerships, and qualifications linkages, or articulations as well as exemptions and waivers are some of the existing arrangements for securing permeability, relying in a wider sense upon validation and recognition of acquired learning outcomes.

The current study will respond to the need for a structured and critical overview of devices, tools, arrangements, etc. [hereafter ‘mechanisms’] to support permeability and progression, and will as well support a more coherent understanding of the pre-requisites and patterns for linking ECVET and ECTS into a single credit system for education and training. This overview should include an analysis of the development of trust in partnerships for progression and permeability starting from the working definition that zones of mutual trust are “agreements between individuals, enterprises and other organisations concerning the delivery, recognition and evaluation of vocational learning outcomes (knowledge, skills and competence)”<sup>28</sup>.

The study should also consider and analyse how the individual learner as core actor of progression is enabled to organise his/her learning pathway and how the education and training systems / qualifications systems are adapting (or not) to the need for flexibility in learning paths. Permeability should also be analysed in the context of de-institutionalisation of qualifications and of the change of the institutional set-up of education and qualifications systems in which stakeholders are redefining their remits. This should include elaborating on change of educational governance, on the diversity of vocational education and training (VET) and higher education (HE) provisions in Europe and the reciprocal expectations between labour market and education/training system. Those elements are detailed hereafter in terms of tasks.

## 2.3 Description of the tasks

Against the general purpose as described above, the contractor shall perform the following tasks:

- I. Review research literature on the impacts of permeability and progression on the institutional settings and governance patterns of education and training (including the concept of zones of mutual trust), the individualisation of learning as well as the functions and roles assigned to qualifications;
- II. Review and analyse comparatively the current situation as regards the mechanisms, rationales and obstacles, as well as impacts of permeability and progression in the 32 countries taking part in the Education and Training 2010 process. This includes:
  - a. A review of the state-of-play on mechanisms to support permeability and progression in the countries taking part in the Education and Training 2010 process. The review should

<sup>26</sup> Schneeberger, Arthur 2008. Früherkennung des Qualifikationsbedarfs in Europa. Schlussfolgerungen für Berufsbildung und Hochschule in Österreich. ibw-Mitteilungen, 2. Quartal 2008. [http://www.ibw.at/ibw\\_mitteilungen/art/schn\\_340\\_08\\_wp.pdf](http://www.ibw.at/ibw_mitteilungen/art/schn_340_08_wp.pdf)

<sup>27</sup> [http://www.cedefop.europa.eu/etv/Upload/Information\\_resources/Bookshop/528/3055\\_en.pdf](http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/528/3055_en.pdf)

<sup>28</sup> (...). ZMTs offer practical help with decisions about the value of qualification and certification, further learning and recruitment into employment. They may be dynamic in nature and may become more or less formal in scope and form according to the mutual confidence and needs of the stakeholders involved” Coles, Mike/Oates, Tim 2005. European reference levels for education and training promoting credit transfer and mutual trust. Study commissioned to the Qualifications and Curriculum Authority, England. Cedefop Panorama series; 109. Luxembourg: Office for Official Publications of the European Communities.

include, among others, the following dimensions of impacts: the institutional settings, governance patterns, individualisation of learning and roles of qualifications;

- b. Based upon the above review, a grounded typology of mechanisms supporting permeability and progression, (national/sectoral) approaches to permeability and progression within VET as well as between VET and HE (and vice-versa);
  - c. In-depth case studies (15 to 20) to support and illustrate the typology of mechanisms (point II b). The case studies should present the mechanisms enabling/hampering permeability and/or progression, and include a SWOT<sup>29</sup> analysis. An assessment of the transferability of the given mechanism (or components of it) to other education and training contexts should also be provided.
- III. Building upon the review and comparative analysis carried under task II, the role of credit systems for permeability and progression in education and training should be analysed. This includes:
- a. Analysing the role of ECVET and ECTS in relation to existing mechanisms for permeability and progression. The specific contribution of credit systems to permeability and individualised learning pathways should be the main focus of the analysis;
  - b. Examining thoroughly the questions of compatibility, comparability and coherence between ECVET and ECTS (as mentioned in the 2009 ECVET Recommendation and the Bordeaux Communiqué) on the basis of national experiences, experimentations and legislations. Related to these questions, approximately 10 case studies should be developed on EQF level 5 qualifications, including a SWOT analysis.
- IV. Identify key common issues of relevance to the further development of permeability and progression in Member States or clusters of Member States. Formulate conclusions which help map out future national and European policy options to take forward the issues of permeability and progression with a particular attention to the emergence of lifelong learning and lifelong recognition paradigm. Propose issues for further research in this field in the context of evidence-based policy making.
- V. Contribute to a Cedefop expert workshop by presenting the rationales and preliminary results of the study including first formulation of policy options and research needs.

## 2.4 Methodology

The study should follow an explorative, comparative and qualitative, approach. It should be theoretically founded, taking into account recent advances in institutional and/or social capital research. It should take into account existing research as well as develop primary data collection.

Review of recent, most relevant, scientific/research publications at national and European levels, analysis of recent policy decisions (and reports), as well as of research reports should be carried out. National experts should be contacted to gather most up-to-date developments; this applies specially to the analysis covering the 32 countries taking part in the Education and Training process 2010.

The analysis of current situation implies developing adequate empirical instruments allowing for quantitative and qualitative comparative approaches. A set of case studies should be developed in addition to the analysis to illustrate the typology. The final selection of case studies should be decided in close cooperation with Cedefop.

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<sup>29</sup> strength/weakness/opportunity/threat

## 2.5 Reports, deliverables and timetable (outcome)

The Contractor is required to submit:

An **inception report**, **two months** after the date of signature of the contract and following the kick-off meeting with Cedefop representatives, which refines the methodology proposed in the tender, including a proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data...).

A **draft interim report**, within **8 months** of the date of signature of the contract; following comments by Cedefop, the **interim report** should be delivered **9 months following** the contract signature. The interim report should comprise:

- The results of the extensive research literature review (task I);
- The preliminary analysis with intermediary findings (tasks II and III);
- Indicative key messages based upon the data collected until then (task IV);
- The work carried out and the data sources that have been used;
- The final version of the tools developed for data collection and analysis as well as for the case studies;
- An updated work plan and timetable, as well as information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- The proposed structure of the final phase and final report of the study.

A **draft final report**, within **20 months** of the date of signature of the contract, and a **final report** within **21 months** of the date of contract signature, following the guidelines provided in these Technical Specifications and including:

- An introduction;
- A comparative analysis on (task I) Scientific discussion, (task II) Mechanisms for permeability and progression, (task III) Credit systems as described in points 2.2 and 2.3 of these Technical Specifications;
- The case studies as described in tasks IIc and IIIb;
- Conclusions that help map out future national and European policy and research options to take forward the issues of permeability and progression with a particular attention to the emergence of lifelong learning and lifelong recognition paradigm (task IV);
- Annexes such as a bibliography, list of abbreviations. A specific annex will be a technical report describing the methodology and the empirical approach (research tools); it will include a summarised transcription of interviews or data collected as well as an overview of the Cedefop expert workshops' inputs to the study (50 pages);

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 (word or excel) and include the data used in order to reproduce the figures.

The interim report should be of around **50 pages** (without annexes), the final report of around **100 pages** (without annexes). 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 H of the Tender Specifications).

On top of these two formal reports (which are linked to payments), Cedefop reserves the right to ask for regular follow-up reports to monitor the smooth performance of the contract.

Cedefop intends to organise a one-day expert workshop aiming at validating the interim results, elaborating upon the further steps and methodology, gaining inputs as well as reacting to problems encountered. This workshop should take place **within 15 to 17 months** of the date of signature of the contract. The contractor may be requested to give input to the background paper to the Cedefop expert workshop. The contractor will be invited to contribute during the workshop as described in task V under point 2.3.

## 2.6 Meeting and Travel expenses

The contractor will be requested to attend the following meetings:

- Three one-day meetings at Cedefop with the project managers of Cedefop
  - ✓ A kick-off meeting will be organised by Cedefop end of January/beginning of February 2010 to fine-tune final planning and methodology for the research analysis;
  - ✓ A meeting to discuss the draft interim report, the interim findings and key messages of the study, and monitor progress;
  - ✓ And a final meeting to discuss the draft final report and agree the final version of the study;
- A one-day expert workshop. As the place of the workshop is not known yet, tenderers are not requested to include the travel and accommodation expenses for this specific workshop in their financial offer. They have to include though the cost for the preparation of this workshop as requested under point 2.3 (task V) in point (a) of Table 1 – Price Schedule Table. The travel and accommodation expenses for this particular meeting will be reimbursed in accordance with point 2.7.3 below.

## 2.7 Reimbursement of travel expenses

2.7.1 All costs incurred (travel, accommodation etc) related to the three Cedefop's meetings linked to the inception, interim and final reports (point 2.6 above) have to be included in the financial offer, point (c) of Table 1.

2.7.2 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 b) of Table 1.

2.7.3 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 III 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 tender procedure.

**In case any document(s) concerning exclusion (point 3.1) and selection criteria (point 3.2) is/are missing, the tender will automatically be rejected.** Cedefop reserves the right to ask for additional clarification, if needed, only on documents presented within the tender. Missing documents will not at all be requested. Before sending, please therefore make sure that all requested documents are included.

#### 3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all consortium members (if any) and all subcontractors specified as per point 4.2, 2<sup>nd</sup> sub-paragraph (if any) shall provide the self-declaration found in Annex C duly signed and dated.

In case of recommendation for contract award the tenderer shall be requested to provide the documentation indicated in point **(I)** of Annex C.

#### 3.2 Selection criteria

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

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

#### 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 must in particular be furnished by the following document(s):

- a statement of tenderer's turnover supported by Audited Financial Statements including the Profit and Loss Account or equivalent for each of the **last three financial years.**

In case of consortium (grouping) or subcontracting (in line with point 4.1 or 4.2 of the tender documents) each member of the consortium and all sub-contractors (identified as per the second sub-paragraph of point 4.2) must provide the required evidence for the economic and financial capacity.

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

### Technical and professional capacity

Tenderers should have sufficient technical and professional capacity to perform the contract in particular with regard to their know-how, efficiency, experience and reliability and must therefore comply with the following criteria:

- Three (3) years of professional experience for the team leader
  - ✓ in research project management
 and
  - ✓ in comparative analysis at European level (the 3 years end on the deadline of submission of offers);
- Extensive experience for all members of the proposed research team in one of the following fields of research: vocational education and training, higher education, lifelong learning, credit systems, qualifications frameworks (including learning outcomes approach);
- Demonstrated capacity to access data and expertise at national and European levels;
- Linguistic ability to communicate and draft to a high standard in English or French (level C1<sup>30</sup> as determined in “Language levels of the Common European Framework of Reference (CEF)”).

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

- Detailed CVs of the proposed team leader and members of the research team of the tenderer and subcontractor/s (if any), with a brief description of their relevant professional experience in relation to the above required criteria and including language qualifications. Cedefop encourages the use of Europass CV(s)<sup>31</sup> but other CV types will also be accepted;
- A brief description of research output/publications related to the issues addressed by this study, including evidence of experience in comparative studies in education and training;
- Description of measures employed to ensure the access to data;
- A list of the major contracts/studies performed in the past three years with dates, sums and commissioning authorities, public or private, specifying the subjects of the contracts/studies;

In case of consortium or subcontracting, the consortium or the tenderer with all subcontractors together have to provide evidence of technical and professional capacity as a whole (see also 4.1 and/or 4.2 below).

### 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.

<sup>30</sup> <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

<sup>31</sup> <http://europass.cedefop.europa.eu/europass/home/vernav/Europasss+Documents/Europass+CV.csp>

## 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 groups 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 additionally specify the identity of those subcontractors only undertaking more than 10% of the work by value, provided total sub-contracting is not above 40% of the work by value. If total sub-contracting is above that ceiling, each and every sub-contractor, independently of his contribution to the work by value, must be identified. The subcontractor(s) (if any) have to provide the documents for the parts that are relevant to them.

All subcontractors identified as per the second sub-paragraph must also provide the required evidence for the exclusion and selection criteria.

Concerning the selection criteria 'technical and professional capacity', the evidence provided by each subcontractor will be checked to ensure that the tenderer and all subcontractors together fulfil the criteria.

Where no sub-contractor is given, the work will be assumed to be carried out directly by the tenderer.

## 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.

### 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 related to (45 points)***
  - The changes in education and training / qualifications systems linked to the lifelong learning approach and the development of qualifications frameworks (10 points)
  - The concepts of permeability and progression as well as the policy challenges linked to those (20 points)
  - The role and potential impacts of credit systems on education and training (15 points)
- ***Award criterion 2 - The quality and appropriateness of the methods suggested to carry out the work (35 points)***
  - The conceptual and methodological research challenges 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)
  - Rationales for the selection and design of case studies (15 points)
- ***Award criterion 3 - The organisation and management arrangements (20 points)***
  - Allocation of tasks, type and degree of involvement of the all 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**

- prior assessment of the issues in terms of their potential impact on qualifications systems and lifelong learning policies;
- discussion of the subject demonstrating in-depth understanding of the following issues and their linkages:
  - qualifications and qualifications frameworks developments;
  - governance and institutions in education and training;
  - the learning outcomes approach in education and training;
  - credit systems and validation processes;
  - learning paths and learning pathways in education and training.

### **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 literature review;
  - the primary data collection;
  - the typology development ;
  - the potential data sources to be used;
- detailed description and explanation of the rationales for selecting the case studies emphasising on
  - the role of the case studies in the overall study research framework;
  - the approach used in terms of number and main characteristics of the case studies foreseen.

### **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 subtotals 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) (if applicable)**

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

#### Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- Any extra travel expenses, 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 point 2.7.3)
- Under articles 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, 3 and 4** 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:**

- a cover letter duly signed from the individual(s) entitled to sign the contract in case of contract award, as requested in point 4 of the invitation to tender;
- the exclusion criteria declaration duly signed as requested in point 3.1 and standard template found in Annex C;
- all selection criteria documents as requested in point 3.2;
- the legal entity form as requested in point 3.3 and found in Annex D;
- the financial identification form as found in Annex E;
- the checklist found in Annex F

### **6.2 Envelope B – Technical proposal**

One original signed unbound version and three 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 three copies of:**

- the financial proposal containing all information requested in point 5.1

## **ANNEX A**

### **CONTRACT NOTICE**

**ANNEX B**

**DRAFT CONTRACT**

## **ANNEX C**

**Declaration of honour with respect to  
the Exclusion Criteria and absence of conflict of interest**

## **ANNEX D**

### **LEGAL ENTITY FORM**

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

[\*http://ec.europa.eu/budget/execution/legal\\_entities\\_en.htm\*](http://ec.europa.eu/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://ec.europa.eu/budget/execution/ftiers\\_en.htm](http://ec.europa.eu/budget/execution/ftiers_en.htm)

#### **PLEASE NOTE:**

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

## ANNEX F

### 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**

| <b><u>Mandatory documents to be included as part of the tender</u></b>                               | <b><u>Reference paragraph</u></b> | <b><u>Included</u></b>   |                          | <b><u>If the document is not included, please provide an explanation for the reason</u></b> |
|------------------------------------------------------------------------------------------------------|-----------------------------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------|
| <b><u>Envelope ‘A’ must contain</u></b><br>one original and one copy of:                             |                                   | <b>Yes</b>               | <b>No</b>                |                                                                                             |
| - this checklist                                                                                     | Annex F                           | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| - duly signed cover letter                                                                           | point 4<br>(page2)                | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| - exclusion criteria declaration<br>(If applicable, including those of consortia and subcontractors) | Annex C,<br>3.1,<br>4.1 & 4.2     | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| - selection criteria documents<br>(If applicable, including those of consortia and subcontractors)   | 3.2,<br>4.1 & 4.2                 | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| - legal entity form                                                                                  | Annex D,<br>3.3                   | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| - financial identification form                                                                      | Annex E,<br>6.1                   | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| <b><u>Envelope ‘B’ must contain</u></b><br>one original and three copies of:                         |                                   |                          |                          |                                                                                             |
| - the technical proposal                                                                             | 5.2                               | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |
| <b><u>Envelope ‘C’ must contain</u></b><br>one original and three copies of:                         |                                   |                          |                          |                                                                                             |
| - the financial proposal                                                                             | 5.4                               | <input type="checkbox"/> | <input type="checkbox"/> |                                                                                             |

**You should also ensure that:**

|                          |                                                                                                                 |
|--------------------------|-----------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | your offer is formulated in one of the official languages of the European Union.                                |
| <input type="checkbox"/> | both the technical and financial proposals of the offer are signed by you or your duly authorised agent.        |
| <input type="checkbox"/> | your offer is perfectly legible in order to rule out any ambiguity.                                             |
| <input type="checkbox"/> | your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3. |
| <input type="checkbox"/> | the outer envelope bears the information mentioned in the invitation to tender point 3.                         |

## **ANNEX G**

### **LABEL INFORMATION FOR THE INNER ENVELOPE**

**ANNEX H**  
**CEDEFOP'S STYLE MANUAL**