

**CEDEFOP**European Centre for the Development
of Vocational Training

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 29/05/2012
RS/PRO/CALU/2012/0296**OPEN INVITATION TO TENDER****AO/RPA/AZU-VKVET/skill-forecast/003/12****“Mid-term skills supply and demand forecast”****Ref.: Contract notice - 2012/S 97-160683 of 23/05/2012**

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 (and documents included in them) should be submitted preferably in English, but in any case in one (or in any) of the official languages of the European Union.
2. Tenders may be submitted exclusively in one of the following ways:

(a)by post to be dispatched **not later than the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch on the postmark or the date of the deposit slip, to the following post address of Cedefop:

**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:

If using a postal service, tenderers must use a registered, reliable one. If no postmark has been stamped or if the postmark is not legible, Cedefop will accept deposit slip issued by the postal service, provided that this clearly indicates the date as filled in by the post office and not by the tenderer.

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.*

Tenderers should not attach their offer to any of the above informative e-mail or fax.

or

(b1)by courier service to be dispatched not later than **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch to the address below or the date of the deposit slip,

or

(b2)delivered by hand not later than **the date and time specified in the timetable in point 8 below**, 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 (for points **(b1)** and **(b2)**above):

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service, Attention of Mr G. Paraskevaïdis
123, Europe Str,
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:

OPEN INVITATION TO TENDER CEDEFOP No: AO/RPA/AZU-VKVET/skill-forecast/003/12 ‘Mid-term skills supply and demand forecast’ 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 0 of the attached Tender Specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible. It is mandatory 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, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
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 the date and time specified in the timetable in point 8 below. 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:

7.1 Contacts 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 e-mail (C4T-services@cedefop.europa.eu) or by fax (fax No +30 2310 490 028).

Requests for additional information/clarification (if any) from potential tenderers should preferably be written in English and should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

- Cedefop 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 tenders.

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced(<http://www.cedefop.europa.eu/EN/working-with-us/public-procurements/calls-for-tenders.aspx>).

Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.

7.2 Contacts after the final date for submission of tenders and before opening:

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.
- Tenderers are not allowed to amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

7.3 Contacts after the opening of tenders:

- Tenderers should not contact Cedefop on their own initiative at that stage.
- If clarification on the compliance with the Eligibility and/or Selection Criteria is required or if obvious clerical errors in the tender need to be corrected Cedefop may contact tenderer/s in writing to obtain further clarification or documents on specific points of the tender or to correct obvious clerical errors.
- If the necessary information and/or supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification if this might alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. Tenderers must not modify their tender or add any new elements to it. The reply must therefore make clear reference to the relevant information already present in the file. This will serve solely the purpose to provide the Evaluation Committee with a clarification regarding the technical proposal, provided the terms of the tender are not modified as a result.
- In regards to possible clarifications on obvious clerical errors in the Financial Offer, tenderers must not add any new prices, but only explain the quotation on the basis of elements and prices already present in the offer. In case a tenderer alters his financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.
- Tenderers should be prepared to reply to such requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	20/07/2012	17.00h
Last date on which clarifications are issued by Cedefop	as soon as possible	N/A
Deadline for submission of tenders (hand delivered)	31/07/2012	17.00h
Deadline for submission of tenders by post / courier	31/07/2012	N/A
Validity of the tenders	31/01/2013	N/A
Tender opening session	27/08/2012	11.00h

9. Tenderers must maintain the validity of their tender for at least 6 months following the deadline of submission of tenders.

In exceptional cases, before the period of validity expires, Cedefop may ask the tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain his tender for a further period of 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the initial period of 6 months irrespective of the date of notification.

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.

11. 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. If such decision is taken, the tenderers will be notified accordingly.

12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon:

- the signature of an Order or Specific Contract under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.

13. 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). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and 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 Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

14. Your personal data (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:

- the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/info_contract/legal_entities_en.htm), or
- the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).

15. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaïdis

Head of Finance and Procurement

OPEN INVITATION TO TENDER

AO/RPA/AZU-VKVET/skill-forecast/003/12

“Mid-term skills supply and demand forecast”

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

Source: <http://www.cedefop.europa.eu/EN/about-cedefop.aspx>

To provide people with the skills they need, vocational education and training systems (VET) need to adapt quickly to changing demands. European VET policy's central aim is to promote excellence through VET. To make it both an attractive learning option for the brightest and best young people and adults and an effective way of helping those with low levels of qualification to develop their skills.

Cedefop, (the European Centre for the Development of Vocational Training) founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It provides the European Commission, Member States ⁽¹⁾ and social partners with insights into trends concerning VET and offers advice on how European VET policy should meet the challenges Europe and its citizens face.

The evidence Cedefop provides comes from its:

- Monitoring of VET policy developments and reforms in Member States;
- Comparative research and analyses, including anticipation of future skill supply and demand;
- Forums for debates among policy-makers, social partners, researchers and practitioners on the best ways to tackle the challenges Europe faces.

CEDEFOP'S OBJECTIVE AND PRIORITIES FOR 2012-14

Cedefop's activities are guided by its strategic objective and medium-term priorities for 2012-14. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET, that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

Modern VET systems must be relevant to individual and labour market needs. They should take into account learning acquired in different ways (for example through work experience) and at different times, and allow people to move between countries and sectors.

Member States decide national VET policies and Cedefop monitors and reports on the reforms and changes they make to their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with Member States and social partners, has agreed shared objectives. As part of this cooperation, Cedefop has helped develop, and is now working to implement, common European tools and principles which aim to make it both easier to work and study abroad and move between different parts of a national education and training system (for example between general and vocational education).

⁽¹⁾ Cedefop also works with Iceland and Norway.

- **Careers and transitions – Continuing VET, adult and work-based learning**

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness.

New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

- **Analysing skills needs to inform VET provision**

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and jobs' requirements.

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States. Cedefop is also finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

CEDEFOP'S INFORMATION

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year. Cedefop also coordinates the study visits programme for the European Commission. Study visits are short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning.

In addition to its web portal www.cedefop.europa.eu, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and Twitter at www.twitter.com/cedefop.

1 Overview of this tender

In submitting his tender in response to this tender procedure, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale and terms of business may be, which he hereby waives. No account can be taken of any reservation or disclaimer expressed in the tender as regards the tender dossier's Tender Conditions and Specifications and the Contract's Special and General Conditions. If necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender. Any reservation or disclaimer may result in the rejection of the tender without further evaluation on the grounds that it does not comply with the conditions of the Tender Dossier.

Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a Technical and Financial Proposal containing all the required information and documentation may lead to the rejection of the tender.

1.1 Description and type of the contract

a) Title of the contract: Mid-term skills supply and demand forecast:

Cedefop's skills supply and demand forecasts for Europe are widely used and the forecast results appear in key EU strategic documents. The main goal of the project is to continue producing regular forecasts of skill supply and demand in a quality, size and scope comparable to the previous Cedefop forecasts. It is expected that the methodological apparatus will be developed further and the results analysed in detail, including analysis of different scenarios and potential labour market imbalances.

b) Type of contract: Framework Contract

Cedefop will offer a single framework contract to the selected tenderer. The framework contract establishes the basic terms for a series of work assignments to be concluded over a period of maximum 4 years.

The tasks foreseen under this contract will be performed by the Contractor upon signature of separate Order Forms issued by Cedefop for each work assignment. The content of each Order Form will be finalised in line with the tender and shall stipulate the tasks to be performed by the Contractor, the deliverables, the timetable, the budget, the human resources/experts to be allocated and the reports to be presented.

The nature of framework contract implies that the implementation of each subsequent work assignment is conditional on the acceptance by Cedefop of the deliverables and approaches proposed by the Contractor in previous work assignments.

1.2 Place of delivery or performance

The tasks must be completed outside Cedefop at the Contractor's premises.

1.3 Division into lots

This tender procedure is not divided into lots.

1.4 Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications. Cedefop will disregard any variants described in a tender, and further reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5 Value or quantity of purchase

The estimated budget for the required *services* described in this call for tenders is of the order of 1.600.000 EUR (without VAT) over a 4year period.

Table 1: Indicative estimated budget of the contract:

Total budget (estimate)	1.600.000 €
2013 work assignment (estimate)	400.000 €
2014 work assignment (estimate)	400.000 €
2015 work assignment (estimate)	400.000 €
2016 work assignment (estimate)	400.000 €

Tenderers should be aware that the information on annual budget in table 1 is purely indicative. It is not binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms to be issued may not reach the aforementioned estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Order Forms.

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, shall have an initial duration of one (1) year and will be automatically renewed up to three (3) times, each for an additional period of one (1) year, covering a total acquisition period of four (4) years (1+1+1+1) -see also 1.1b.

1.7 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 (**Annex B**).

2 Terms of Reference

2.1 Background information

Cedefop's work in the early identification of skill needs is widely recognised. The first pan-European forecast of skill needs was published by Cedefop in 2008⁽²⁾. It provided comprehensive projections of skills needs by sector, occupation and qualification across Europe until 2015. This projection was followed by the complementary forecast of skills supply in Europe in 2009⁽³⁾. It provided forecasts of population and labour force by gender, age groups and qualification. These efforts were combined in 2010⁽⁴⁾ when the first extensive forecast of both skills supply and demand was released⁽⁵⁾.

Good labour market intelligence is important when dealing with the consequences of the recent economic recession. Even with some signs of economic recovery, Europe is still about to face several important challenges that will affect its labour market in the future. The ageing society calls for a more effective use of the labour force as fewer young people will replace those who will leave the labour market due to retirement. Production processes are becoming increasingly sophisticated. Public budgets will face important austerity measures due to the need for fiscal consolidation after the crisis. As education systems are likely to face increasing budgetary tension, there is a need to identify the necessary skills to be developed so that individuals can successfully enter the future labour market.

The need for regular forward-looking assessments has received impetus in various policy documents. The report by the expert group on New skills for new jobs, prepared for the European commission "New skills for new jobs: action now", emphasised the need for an overall coordinated approach to improve Europe's capacity to anticipate changes on the European labour market. Cedefop received a mandate by the Council conclusions on "New skills for new jobs: the way forward"⁽⁶⁾ to forecast most recent trends in skills supply and demand for Europe every two years. One of the flagship initiatives in the new Europe 2020 strategy is the Agenda for New Skills and Jobs⁽⁷⁾. The European Commission will within this initiative "produce an EU Skills Panorama to improve transparency for jobseekers, workers, companies and/or public institutions". Cedefop skills supply and demand forecast will be one of the key building blocks of the EU Skills Panorama.

2.1.1 Current state of affairs

The conceptual framework of the Cedefop methodology for producing the skills supply and demand forecast is based on modular approach which enables continuous improvements and further development of particular elements/modules. It also allows changing the input data as well as key assumptions or develops different alternative policy scenarios. This approach has been adopted at the earliest stages of the development⁽⁸⁾ and was improved further to reach the current structure. The report "Skills supply and demand in Europe: methodological framework" on the latest modelling development is available to tenderers in Annex K.

⁽²⁾ Future skill needs in Europe: medium term forecast synthesis report Cedefop (2008) <http://www.cedefop.europa.eu/EN/publications/12962.aspx>

⁽³⁾ Future skills supply in Europe medium term forecast synthesis report Cedefop (2009) <http://www.cedefop.europa.eu/EN/publications/5069.aspx>

⁽⁴⁾ Skills supply and demand in Europe: medium term forecast up to 2020 (Cedefop 2010) <http://www.cedefop.europa.eu/EN/publications/15540.aspx>

⁽⁵⁾ The project is currently supported financially from the Progress programme – European community programme for employment and social solidarity (2007-13), managed by the Directorate General for Employment, Social Affairs and Equal Opportunities of the European Commission

⁽⁶⁾ Council conclusions on "New skills for new jobs: the way forward" (Council of EU 2010) http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/lsa/114962.pdf

⁽⁷⁾ Communication from the commission to the European parliament, the Council, the European economic and social committee and the Committee of regions, An agenda for new skills and jobs: A European contribution towards full employment (European commission 2010) <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF>

⁽⁸⁾ Future skill needs in Europe: medium term forecast, background technical report Cedefop (2009) <http://www.cedefop.europa.eu/EN/publications/5015.aspx>

The uniqueness of Cedefop's approach is that it uses single methodology and harmonised data to provide forecasts for a range of countries ⁽⁹⁾. The forecast of labour demand is produced for 41 industrial sectors (compatible with NACE rev 1.1), 27 occupational groups (based on ISCO 88 classification) and 3 broad qualification levels (based on ISCED classification). The forecast of labour supply is disaggregated by 5 year age bands (starting from 15 - 19 to 65 and more), by gender and 3 broad qualification levels (based on ISCED classification). Moreover the forecast includes components to describe potential labour market imbalances (skills mismatch) through various indicators.

Cedefop's forecast is driven by the multi-sectoral multi-country macroeconomic model. The model provides a set of consistent employment forecasts by economic sector and country. The current module combines elements of an annual econometric model and a medium-term sectoral model. The model produces labour market demand forecasts for 41 economic sectors/industries (compatible with ESA 95 and NACE). Labour supply is disaggregated to five year age groups. Eurostat database (National Accounts) as well as some OECD data from Stan database are used to obtain consistent and mutually comparable forecasts across countries. The forecast initially covered all EU Member States, Norway and Switzerland. The development of the project in 2011 successfully extended the range to Croatia, Iceland, the Former Yugoslav Republic of Macedonia and Turkey. To establish consistency within various EU initiatives, the short-term forecasting trends were calibrated with the forecast of DG ECFIN¹⁰. The design of the Cedefop skills supply and demand forecasting framework has not intended to develop own underlying pan-European structural macroeconomic model. The model used so far has been developed by the current contractor and only adjusted to fit the extension for Cedefop forecast.

The employment trends (expansion demand) by occupation and qualification are calculated in two different modules (EDMOD and QMOD) based on harmonized data from EU Labour Force Survey (ELFS). These data enable the construction of sector – occupation or occupation – qualification matrixes. Connecting this matrix and the outputs from the multi-sectoral multi-country model provides the results for employment by occupation and qualification. This module is based on sophisticated econometric methods which allow introducing dynamics to the different elements of the matrix.

Replacement demand module (RDMOD) calculates the needs to replace those who leave labour force due to different reasons (retirement, migration etc.). The results are crucially dependent on quality of input data. The current estimates are based on cohort component method.

The supply of skills is measured by highest formal qualification achieved by individuals. The forecast provides results for population and labour force disaggregated by age, gender and formal qualification ⁽¹¹⁾. Current labour supply is a function of economic activity, real wage, unemployment rate and benefit rates. At present, model parameters are estimated for different countries, age groups and gender. This is of key importance for modelling educational participation and attainment since these are known to be gender and age specific. This expanded model framework is then used to create a detailed set of baseline projections for labour supply.

The ideal model to forecast labour supply by different qualification levels is a full stock-flow model. This would enable one to record qualification development during the working life of individual. This ideal state is, however, not easy to achieve due to restricted availability of data. Even though the attempts to develop a flow model had moved significantly forward, the current approach remains restricted to modelling the stock of labour force.

The interactions between labour supply and demand by qualifications cannot be easily captured. There are significant numbers of jobs that are filled by individuals with different qualifications than initially required. The module that confronts the demand and supply taking into consideration this issue is BalMod. BalMod distributes disposable labour supply with certain qualification between working places based on the assumptions on trends in unemployment rates by levels of qualifications.

⁽⁹⁾ EU 27 Member States, Croatia, Iceland, FYROM, Norway, Switzerland., Turkey

⁽¹⁰⁾ For more information visit: http://ec.europa.eu/economy_finance/eu/forecasts/index_en.htm

⁽¹¹⁾ The forecast distinguishes three broad levels of qualifications based on ISCED classification: low for ISCED 1 and 2; medium for ISCED 3 and 4 and high for ISCED 5 and 6.

Final adjustments are done taking into consideration labour accounts which capture double counting (differences between the place of residence and working place), participation of further training, different definitions of unemployment as well as other statistical discrepancies. In line with BalMod, indicators of imbalances were developed to better interpret the potential skill mismatch.

Cedefop's forecast does not intend to replace initiatives taking place at national level. It provides, by using harmonized data and a single methodology, results comparable across countries. These results can provide a unique picture of the labour market trends and skills development within the EU, which is hardly to be offered by national level forecasts.

Cedefop's results and latest methodological achievements are always subject to a validation process by Skillsnet experts⁽¹²⁾. These experts represent wide range of expertise including academics, labour market economists, econometricians and statisticians, etc. Under the current FWC, one or two workshops per year have been organized by Cedefop to obtain national validation of data and results as well as expert feedback on the methodological developments.

Forecasting is inevitably an ongoing process which is affected by everyday reality. There is a necessity to test the accuracy of methods used and to compare these with any available alternatives so as to increase the quality of the results. At the same time new data (reference period and level of details) are published by statistical authorities and new policy measures affecting education and training and the labour market are taken. This highlights the necessity of using the most up-to-date information. Achieving the most reliable results requires also systematic work.

2.1.2 Related projects

- Other Cedefop projects identifying skill needs⁽¹³⁾
- The EU skills Panorama to be launched end of 2012⁽¹⁴⁾.

2.2 Objective, purpose and expected results

2.2.1 Overall objective and purpose of the contract

The main purpose of the contract will be to undertake work on Skills supply and demand forecast in order to be able to assess the future trends in the labour market taking skills as a key parameter. These trends are vital as they provide important information for different labour market actors: employees, employers, students and parents, social partners, policy makers to take informed decisions and appropriate actions on the labour market. The forecast should act as an early warning mechanism with the aim of improving the interaction on the labour market and to avoid potential skill imbalances.

Ownership of the multi-sectoral multi-country macroeconomic model: The current modelling framework used in Cedefop's forecast uses an existing multi-sectoral multi-country macroeconomic model developed by the current contractor before and outside of contract with Cedefop. As there are no financial resources to be allocated for the development of a commensurate macroeconomic model within the context of this contract, the possession of such a model is a key technical requirement. The model should be able to produce forecast of key macroeconomic parameters, including employment trends by NACE compatible sectors (as detailed as possible and at least similar to the level of detailed achieved in the current Cedefop forecast) and labour supply results for the EU Member states with

⁽¹²⁾Skillsnet is a network established by Cedefop which gathers researchers and experts active in early identification of skill needs and forecasting or in the transfer of research results on future skill requirements into policy and practice. Skillsnet members actively contribute to various Cedefop activities related to identification of skill needs (forecasting, employer surveys, sectoral analysis) and receive privileged access to information. For more information visit: <http://www.cedefop.europa.eu/EN/about-cedefop/networks/skillsnet/skillsnet.aspx>

⁽¹³⁾ More information on other Cedefop projects on Identifying skill needs is available on Cedefop webpage: <http://www.cedefop.europa.eu/EN/identifying-skills-needs/index.aspx>

⁽¹⁴⁾<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF>

possible further geographical extension ⁽¹⁵⁾. The model should enable the design of different scenarios reflecting possible future socio economic developments based on various policy measures taken.

In case the tenderer's underlying multi-sectoral multicounty macroeconomic model is not currently able to deliver results according to the requirements set, it has to be **clearly demonstrated** in the offer that tenderer is able to **adjust the current macroeconomic model within the first half year of the project** to be successfully implemented into Cedefop modelling framework⁽¹⁶⁾. See also point 3.2.

The contractor should be able to carry out and develop further the regular forecast of skills supply and demand for Europe forecasting results and to provide results in the comparable size and scope, as well as compatible with, previous Cedefop forecasts. The contractor will be asked to regularly produce/update the forecasting results and further develop methods, modules and systems to improve the quality of the forecast. It is also expected that along with the basic forecast (baseline scenario), different alternative scenarios reflecting possible socio-economic developments and impact of different policies will be designed, calculated and evaluated. Further analyses of results with special focus on cross country, cross sector/industry and cross occupation comparison will also be carried out within this project. The detailed work plan will be implemented through specific order forms that will be issued based on the framework contract.

It is important to ensure interconnection between the forecast outcomes and outcomes of other Cedefop as well as European/international projects to obtain synergy effects between various skills anticipation efforts of different actors.

2.2.2 Results to be achieved by the contractor

The results to be achieved by the contractor should correspond in size, scope and structure to previous Cedefop forecasts. The forecasts should deliver results for all 27 EU Member States + Croatia (HR) which is expected to join EU on 1st July 2013. The modelling system should be designed with a possibility to be further extended to Norway, Switzerland, Iceland, the Former Yugoslav Republic of Macedonia and Turkey upon request by Cedefop.

The forecast of skills supply and demand should be produced up to the year 2030. The results should be organised and provided at least in the following disaggregation:

Skills supply:

- 5(five) year age groups starting from 15 – 19 until 65+
- Gender
- 3 (three) broad levels of formal qualification compatible with ISCED

Skills demand:

- 2-digit NACE rev 2 sectors or compatible
- 2- digit ISCO 08 or compatible
- 3 (three) broad levels of formal qualification compatible with ISCED

Potential skills imbalances:

- Unemployment by country and qualification level
- Continue developing the imbalances indicators⁽¹⁷⁾

⁽¹⁵⁾ More detailed information on underlying model is in chapter 3 of document Skills supply and demand for Europe: Methodological framework which is available in Annex K.

⁽¹⁶⁾ More details on Cedefop forecasting framework is in the chapters 4 – 7 of document Skills supply and demand for Europe: Methodological framework which is available in Annex K.

⁽¹⁷⁾ More details on the imbalance indicators as well as other modelling developments are available in technical report in Annex K.

Developments in statistical classifications used should be reflected in the forecast, in particular when they are likely to increase the degree of details attained.

Together with the baseline scenario describing the most likely development should be produced at least two alternative scenarios - optimistic and pessimistic. These alternative scenarios should reflect different possible policy measures as well as different phases of global economic cycles. The detailed specifications and content of the scenarios are to be discussed and finalized with Cedefop. All results should be delivered in a form which will be relatively easily transferred into the “Skills forecast – online data and results” ⁽¹⁸⁾, an online interface for better access to skills supply and demand forecasting results.

An important part of the deliverables will be qualitative analyses of results interpreting and investigating various labour market developments. As the forecast provides a range of results, their detailed analysis of different occupations and sectors are parts of the work too.

2.3 Scope of the work

2.3.1 General description

The work on the project will be organized around four consecutive order forms whereby the results from one year are expected to feed into the next one. The main task will be to produce the new Cedefop skills demand and supply forecasts in the scope and size as the previous forecasts (or more detailed). The contractor will also be expected to further develop the modelling framework and methods. The qualitative inputs to the modelling process as well as an interpretation of the results will also be required to be delivered.

The first year work assignment will mainly focus on adoption of the Cedefop methodology, linking the underlying model proposed by the contractor to overall Cedefop modelling framework. The full set of forecasting results compatible with previous Cedefop forecasts are expected to be produced and tested by the end of the first contractual year (i.e. the first order form).

The second year work assignment will focus on the development and improvement of the modelling methodology, i.e. various parts and modules of the framework. It is expected that a fast update ⁽¹⁹⁾ of the forecast will be produced. Evaluation process as well as detailed analyses shall be produced too. The analyses should utilize the wide range of results produced by the forecast, include other qualitative information and be focused on developments within countries, sectors or occupations.

The third year work assignment will concentrate on the implementation of the modelling developments achieved in the second year to produce new full set of forecasts. The works on further analysis and possible improvements of methodology should continue as well. .

The final year should be concentrated on the production of a detailed report, writing and finalizing all issues related to modelling development as well as the detailed analyses. A fast update of forecast is expected to be delivered too.

The development of the methodology and forecasting results should be subject to a validation process. Two validation workshops should be organized with Cedefop Skillsnet experts each year to obtain validation of country specific results as well as feedback on methodological developments. Workshops will be organized by Cedefop in cooperation with the contractor, who will be mainly responsible for the content. The Skillsnet experts may be contacted also in the course of development process to ensure smooth development of tasks. The communication between the contractor and the Skillsnet members will be organized by Cedefop.

⁽¹⁸⁾ For more information visit <http://www.cedefop.europa.eu/EN/about-cedefop/projects/forecasting-skill-demand-and-supply/skills-forecasts.aspx>

⁽¹⁹⁾ A fast update is considered to be the recalculation of forecasting results without extensive changes in the modelling framework using the most recent available data. The key modelling equation should be re-estimated and the assumptions of the forecast should be in line with general understanding of the world at the time of producing this update.

2.3.2 Work assignments and related tasks

The specific activities within each work assignment, related tasks and years of start are indicated below:

OF1 (2013) - Adopting Cedefop methodology and providing new forecast

<u>Expected tasks/activities</u>
1. Adopting Cedefop methodology
- Adjust contractor's macroeconomic model to fit the methodology developed by Cedefop - Develop tools to enable replication of calculations developed by Cedefop in the past to forecast labour supply by age groups, gender and qualification, labour demand by sector, occupation and qualification (including replacement needs) - Produce assessment of quality for all used modelling tools
2. Producing skills supply and demand forecast
- Review existing data sources and create/update relevant databases with most recent data, including indication of measures for adjusting them if necessary - Produce skills demand and supply forecasting (baseline scenario). The results should be in line with description in 2.2.2 - Develop confidence and prediction intervals for results and produce analysis of such results - Produce at least two alternative scenarios to the baseline, reflecting possible impacts of different policy measures as well as economic and other developments - Continue with developing the imbalance indicators to enable solid interpretation of the nature and scope of possible labour market imbalances based on the forecast - Examine the consistency of the results with the previous Cedefop forecast using ex post simulations of the model
3. Analysis and reporting activities
- Provide qualitative analysis/interpretation of results, including policy recommendations - Prepare and submit all reports in appropriate quality and according to the time schedule

Indicative task lists for the following three years:

OF2 (2014) - Developing the methodology further

<u>Expected tasks/activities</u>
1. Produce Skills supply and demand fast update forecast
- Update all databases with appropriate data and re-estimate key modelling equations - Produce fast update of skill supply and demand forecast (baseline scenario) - Produce at least two alternative scenarios to the baseline, reflecting possible impacts of different policy measures as well as economic and other developments
2. Further development of forecasting methodology
- Develop further the skills demand modules - Develop further the skills supply modules - Evaluate possibilities to implement other countries to forecasting framework - Develop further methodology for analysing interactions between skill supply and demand, and imbalance indicators to enable solid interpretation of the nature and scope of possible labour market imbalances based on the forecast
3. Analysis and reporting activities
- Undertake evaluation and confrontation of forecasting results (qualitative and/or quantitative) - Provide qualitative analysis/interpretation of results, including policy recommendations - Produce detailed analyses of results – by sector, occupation and qualification - linking together quantitative results and qualitative information obtained elsewhere - Carry out other relevant analyses of results (to be specified in the order form) - Prepare and submit all reports in appropriate quality and according to the time schedule

OF3 (2015) - Applying new developments to forecasting framework and providing new forecast

Expected tasks/activities
1. Produce Skills supply and demand forecast
• Update all databases with appropriate data and re-estimate all modelling equations • Apply all developments achieved in the year 2 into the modelling framework • Produce new set of forecasting results based on improved methodology (baseline scenario) • Produce at least two alternative scenarios to the baseline, reflecting possible impacts of different policy measures as well as economic and other developments • Extend forecasting exercise to other countries (based on the results from OF2)
2. Analysis and reporting activities
• Provide qualitative analysis/interpretation of results, including policy recommendations • Continue producing detailed analyses of results – by sector, occupation and qualification - linking together quantitative results and qualitative information obtained elsewhere • Carry out other relevant analyses (to be specified in the order form) • Prepare and submit all reports in appropriate quality and according to the time schedule

OF4 (2016) - Summarization of forecasting works and designing ideas for future

Expected tasks/activities
1. Produce Skills supply and demand fast update forecast
• Update all databases with appropriate data and re-estimate key modelling equations • Produce fast update of skill supply and demand forecast (baseline scenario) • Produce at least two alternative scenarios to the baseline, reflecting possible impacts of different policy measures as well as economic and other developments
2. Analysis and reporting activities
• Undertake evaluation and confrontation of forecasting results (qualitative and/or quantitative) • Provide qualitative analysis/interpretation of results, including policy recommendations • Continue producing detailed analyses of results – by sector, occupation and qualification linking together quantitative results and more qualitative information obtained elsewhere • Provide detailed analysis on interactions between skill supply and demand, and imbalance indicators to enable solid interpretation of the nature and scope of possible labour market imbalances based on the forecast • Carry out other relevant analyses (to be specified in the order form) • Provide and submit all reports in appropriate quality and according to the time schedule

2.4 Reporting

The following reports, to be submitted to Cedefop Project Manager identified in the contract in high level English, will be required within each yearly work assignment. The contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English. The proofreading can be arranged within the team by native speaker or person with adequate language skills or by means of subcontracting entity, the cost for which should be included in the Financial Proposal (see point 5.3, item 2c). The reports have to comply with Cedefop style manual attached in Annex L.

Inception report:

The inception report is due within 1 (one) month of the kick-off meeting and will confirm and/or clarify the rationale of sources to be used, the methodology, the work plan and timetable for the research per task within the annual assignment. The sequence of tasks performance and related reporting will be agreed at the kick-off meeting.

Interim reporting:

An interim report will be due within 6 (six) months of the signature of the respective order form and will include:

- Interim report presenting work progress, intermediary findings and indicative conclusions (if possible). The scope and the size of the report should be agreed on the kick-off meeting.
- Draft background reports including detailed information of development of particular task. The background reports should be available for dissemination to Skillsnet experts at least two weeks before the planned interim workshop.

Final reporting

The final report covering all tasks in the assignment must be submitted within 12 (twelve) months of signature of the respective order form and will include:

- Executive summary with key findings and conclusions for policy making at European and Member State levels (approx. 20 pages)
- A comprehensive synthesis report presenting the approaches, main results, analysis and conclusions for policy making (approx. 100 pages)
- Background reports including detailed description of the methodology, software and data used for each task. Drafts of final background reports should be available for dissemination to Skillsnet experts at least two weeks before planned workshop.
- Full set of forecasting results in understandable and well-structured form.
- Other background information including databases, models, and programmes should be part of final reporting upon requests by Cedefop.

Cedefop will provide comments to the reports within 30 days after the delivery of these reports. Each report is considered to be a draft report until Cedefop has approved it. The contractor is therefore requested to take Cedefop comments into account and if necessary amend the report. If no comments are made within 45 days period, reports are considered as final.

2.5 Meeting and travelling expenses

The contractor will be requested to attend three scheduled meetings with Cedefop project managers (one day meeting) for each order form.

- At the start of the work (kick off meeting in January 2013)
- Upon submission of the interim report
- Before submission of final report (final results meeting)

Two validation workshops are planned to be organized each year to discuss developments of the project with Skillsnet members.

Meetings should take place mainly in Cedefop premises in Thessaloniki. Depending on the ad-hoc needs and in order to ensure the best time effective solution, alternative venues for those meetings as well as a possible merge of the inception and final meetings with validation workshop(s) may be agreed between Cedefop and the contractor.

All costs, including travel and accommodation related to these three meetings and two validation workshops as well as any travel expenses that may occur in performing the tasks as described above, have to be included in the financial offer (see point 5.3, items 2a and 2b).

Travel expenses for other eventual meetings with Cedefop or other Skillsnet events apart those mentioned above that might be needed in performing the tasks related to the contract shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see annex of the draft contract Annex B).

3 Specific information concerning participation to this tender

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, given in Annex C. Therefore all tenderers, all group (consortium) members (if any) and any subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) **MUST** provide the self-declaration found in Annex C duly signed and dated. The exclusion criteria will be assessed in relation to each company individually.

Cedefop reserves the right to check the situations described in points c) and f) of the declaration.

In the event of recommendation for contract award, point l) of Annex C will apply.

3.2 Selection criteria

The selection criteria concern the tenderer's capacity to execute similar contracts.

The tenderers must submit documentary evidence (or statements, where required) of their economic, financial, technical and professional capacity to perform this contract.

Each and all requirements for economic and financial capacity should be fulfilled by the tenderer - alone (in the case of single tenderers) or as a whole (in case the tenderer is a grouping/ consortium). Participation in tendering is open to all legal persons bidding either individually or in a grouping (consortium) of tenderers.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his 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 his disposal. This obligation may be fulfilled by presenting statements from those entities or the consortium agreement.

3.2.1 Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer for the last **three** financial years concerning the type of **services** covered in this call for tenders should be at least **400,000 €** (four hundred thousands).

Proof of economic and financial capacity **must** be furnished by the following documents:

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last **three** financial years concerning the type of **services covered** in this call for tenders.

In case of a consortium (grouping) or subcontracting each member of the consortium and all subcontractors (in line with points 4.1 or 4.2 below) must provide the required statement for the economic and financial capacity, **but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.**

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors.

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, he is required to justify the non-provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2 Technical and professional capacity

The tenderers are required to have sufficient technical and professional capacity to perform the contract. They must demonstrate qualification, knowledge, skills and the ability to perform the tasks outlined in the terms of reference (chapter 2).

Requirements for Technical and professional capacity:

- The tenderer must have performed at least two **(2)** contracts in the past three **(3)** years in the field of the economic and labour market forecasting and analysis.
- The tenderer must prove that he owns a multi-sectoral multi-country macroeconomic model which should be successfully implemented into Cedefop modelling framework.
- The Tenderer's team of experts, who will be proposed to carry out the contract, must have the relevant profiles, knowledge, expertise and experience for the successful implementation of the contract. The composition of the team should ensure high-level expertise and quality assurance for the development and production of the forecast and following analysis. Should one team member carry out the professional proof-reading and editing (see also point 2.4), he/she must be clearly identified and indicate in his/her CV that he/she possesses a level of English equivalent to **C2**. The project leader, **at least two senior experts** and junior experts necessary for completing the tasks should be clearly identified in the tenderer's offer.

Project leader

The leader of the project should be clearly identified in the offer. He/she is expected to act as a coordinator and scientific advisor to the team. He/she should be able to lead the team and maintain the communication with Cedefop and other Skillsnet experts. He/she must meet the below mentioned requirements:

- Qualifications: University degree in social sciences, economics or mathematics;
- General professional experience: at least 10 years of professional experience in the field of labour market forecasting and/or qualitative labour market analysis;
- Specific professional experience: Experience with leading at least one international project focused on forecasting and/or labour market analysis within the last three years;
- Language abilities: Level of English should be at least C1.

Senior experts

They must meet the below mentioned requirements:

- Qualifications: University degree in social sciences, economics, statistics, econometrics or mathematics.

- General professional experience: at least 5 years of professional experience in the field of economic modelling and/or labour market analysis and/or policy analysis. The following experience must be covered by the team of senior experts **as a whole**:

- labour market modelling and forecasting,
- development of the modelling tools,
- running forecasts and incorporating results of qualitative analysis into quantitative outputs,
- quantitative and qualitative analysis of labour market,
- interpretation of results, understanding labour market,
- education and other related policies at different levels (EU, Member States, regions)
- designing adequate policy scenarios
- cross-country, cross-sectoral and cross-occupational analysis

- Specific professional experience: Each expert must have been a member of at least one international research team working on forecasting and/or labour market analysis in the last three years.

- Language abilities: Level of English should be at least C1.

Junior experts

They must meet the below mentioned requirements:

- Qualifications: University degree in social sciences, economics, statistics, econometrics, mathematics.

- General professional experience: at least 3 years of professional experience in the field of economic modelling and/or labour market and/or policy analysis. The following experience must be covered by the team of junior experts **as a whole**:

- Create, adjust and handle large scale datasets
- Run statistics, econometric and/or other quantitative analysis
- Design, build and program different forecasting models, modules and systems
- Create, design and develop baseline and alternative scenarios
- Interpret results and conduct quantitative and qualitative analysis
- Understand the functioning of economic systems and labour market in particular
- Cross-country, cross-sectoral and cross-occupational analysis.

- Language abilities: Level of English should be at least B2.

Proofs / Evidences of Technical and professional capacity

The following documents or information must be presented by the tenderer to prove his technical and professional capacity to perform the proposed contract:

- Brief profile of company / institution, including information as to experience relevant to the subject of this call for tenders – See Questionnaire 3 of Annex G.
- List of contracts performed in the past **three (3)** years consistent to the above mentioned criteria, describing the contracting authorities, the subjects, the dates, and the percentage performed by the tenderer - See Questionnaire 4 of Annex G.
- Short description of the underlying multi-sectoral multi-country macroeconomic model including relevant information such as structure of the model, key interactions in the model, reference publications, the reference to key users of the modelling results as well as the software used to run the model.
- The detailed CVs of the project leader, senior and junior experts proposed to implement the contract. CVs should include information aimed at demonstrating the professional capacity of the team members as above required as well as a list of publications. They should also present the linguistic abilities in English. The tenderers are welcome to use the **Europass** CV format.

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 (please see also 4.1 and/or 4.2 below).

3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form. Tenderers are also requested to complete the respective forms (tables) in Annex G.

The Legal Entity Form should be completed and signed by the representative(s) of the tenderer (who sign(s) the cover letter as per point 4 of the Invitation to tender) authorised to sign contracts with third parties.

The Legal Entity Form should not be submitted by sub-contractors (if any).

4 Additional information concerning participation to this tender

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 106 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 34 countries, namely: the 27 EU member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, FYROM, Albania and Montenegro). The procurement (tender) procedures of Cedefop are **not** open to tenderers from GPA countries.

A natural or legal person can take part (as an individual tenderer or as a member of a consortium submitting a tender) in only one tender. In the opposite case all tenders in which that person has participated maybe excluded from the evaluation.

4.1 Joint Offers/ Groupings (Consortia)

Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.

Cedefop does not require consortia(if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.

If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.

A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.

Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).

Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.

The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

The contract will have to be signed by all members of the group (consortium). If the members of the group (consortium) so desire, they may grant authorisation to one of the members of the grouping by signing a power of attorney. The same model as above duly signed and returned together with the offer (Annex I) is valid also for signature of the contract.

Partners in a joint offer assume joint and several liability towards Cedefop for the performance of the contract as a whole.

4.2 Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault. 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. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers. However the subcontracting of persons/ economic operators from non-eligible countries is limited to max. 30% of the work by value.

The tenderer must clearly indicate the identity of each Subcontractor and the percentage of work by value that he will perform for this contract (please fill in Annex G).

Only in cases when:

- a Subcontractor undertakes between 10% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

the tenderer should submit with the offer:

1. the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective Subcontractor;
2. the required documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2;

3. the Form in Annex J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective Subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract

N.B. The subcontractor(s) (if any) have to provide the documents to prove their capacity only for the parts of the contract that are relevant to them. The evidence provided will be checked to ensure that the tenderer with the subcontractor(s) altogether fulfil the criteria.

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value and total subcontracting does not exceed 40%), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

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 as represented by the highest Total Score (TS) out of 100.

The Total Score (TS), comprising quality + price score, will be calculated for each tender by applying the formula below:

$$\text{Total Score (TS)} = X * (\text{TQV} / 100) + Y * (\text{Cheapest TFO} / \text{TFO})$$

Whereby:

TQV = Total Quality Value of the tender (as per point 5.1);

TFO = Total Financial Offer of the tender (as per point 5.3);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to (70);

Y is the weighting for price (TFO) and for this tender procedure it is fixed to (30).

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each award (evaluation) sub-criterion and a minimum of 65 out of 100 points (TQV) in the technical evaluation – see below).

5.1 Technical proposal

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference in point 2 above providing a practical, detailed description of services proposed for performance of the contract. The tenderers are kindly requested to use the following framework template for the elaboration of their technical proposal:

1. Summary and rationale of the proposal

This part should summarize an overall approach for performing the tasks. The tenderer should demonstrate his understanding of the scope of the work and the expected outcomes of the project.

2. Underlying model

This part should be focused on the detailed presentation of the model which will be used as a basis for Cedefop's new forecast. The type, detailed structure, key interactions and main driving mechanisms of the model should be described. It should be clear from the description how the key interactions between the proposed model and Cedefop's existing framework will be established.

3. Methods and tools for obtaining the results

The tenderer should clearly specify proposed solutions on how to achieve the goals of the project. This part should also present solutions, methods and tools for treatment of particular tasks/activities listed in point 2.3.2. Special stress should be given on the interactions between quantitative results and qualitative information, way of alternative scenarios development and proposals on how to carry on the cross-sectoral, cross-occupational and cross-country analysis, development of imbalance indicators and analysis of potential skills mismatches. Possible proposals for improvement of the existing Cedefop methodology should be also identified.

4. Project management, work organization and team work

The tenderer is expected to specify the project organization structure, including responsibilities, communication strategy and interactions within different parts of consortium and/or subcontractors, if any. The key responsibilities of different levels of experts taking into consideration the expected task list in point 2.3.2 should be also described. This part should contain also information on the time plan of the work and the time allocation within the indicative tasks list described.

5. Quality assurance and risk management

The quality assurance should be specified for the project performance, goals achievement and delivery of results as well as for the quality of administration and financial flows. This part should describe the ways how quality will be ensured at all steps. The potential risks and possible solutions should be also indicated. Special attention should be given to assurance of the maintaining the availability of data.

The maximum length of the Technical Proposal to be submitted is **50 pages** (except table of contents, front and last page and annexes).

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

The tenderer shall identify a **Project Manager** within his organisation who will represent the **single contact point for all administrative and operational communication** in regards to the contract implementation. As appropriate, the Project leader (see 3.2.2.) can also act as Project Manager or a different person from the Project leader can be identified as Project Manager. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

In addition to the above the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 10% of the work by value (or of all subcontractors if total subcontracting is above 40% of the work by value) as requested in point 4.2.

5.2 Technical evaluation

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 tender specifications.

The following Award Criteria will be applied to this tender procedure:

Award criteria	Maximum number of points
1) APPROACH AND METHODOLOGY	70
1.1 Understanding of the project and its context: understanding of the scope and expected outcomes of the project overall and of each work assignment; understanding of the approach/conceptual framework used by Cedefop to build the forecasts; understanding of the concepts, research issues, expected results and analysis to be provided. (Point 1 of the framework template as described in section 5.1)	10

1.2 Quality of the underlying model: the structure and relevance of the proposed model; expected results to be provided by this model; proposed interaction with other modules developed by Cedefop. (Point 2 of the framework template as described in section 5.1)	25
1.3 Method and tools: congruence and reliability of the methodologies, techniques and tools proposed; innovative character of the approaches, relevance of methods and tools used to reach particular outputs for the specific tasks, the way of combining quantitative results and qualitative analysis, possible proposals for improvement of methodology. (Point 3 of the framework template as described in section 5.1)	35
2) WORK ORGANIZATION, QUALITY ASSURANCE AND TIMETABLE	30
2.1 Work organization, management: appropriateness of team structure at all levels; allocation of tasks among the team leader, senior and junior experts, organization of work flows. (Point 4 of the framework template as described in section 5.1)	20
2.2 Quality assurance: relevance of the tools and processes to be used taking into account the specific characteristics of the project; appropriateness of back-up/replacement arrangements; adequate consideration of possible hindrances. (Point 5 of the framework template as described in section 5.1)	10
Overall total score	100

In order to guarantee a minimum threshold of quality, offers that do not reach a minimum of 50% of the possible score for each award (evaluation) sub-criterion, will be eliminated from further evaluation. Tenders scoring as a total less than **65** (of a maximum of 100) points against the award (technical) criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.3).

5.3 Financial proposal

The Financial offer must be clear and in compliance with the tender specifications and should indicate the total price in order to carry out all the activities described in the Terms of Reference. The tenderers must fill-in **four separate** price schedules tables in total and present a detailed breakdown of the price offered (see template in Annex H)

The tenderer should pay attention to the following: for equality of treatment among the tenders, the price schedule table for the first work assignment 2013 (OF 1) shall NOT include expenses related to the activity 1 “Adopting Cedefop methodology” (see point 2.3.2). The tenderer is requested therefore to use the price schedule table 5 for this purpose (See template in Annex H) and should take into account the fact that the maximum budget available for this activity 1 of OF1 has been set at 70,000 Euro.

The Financial Offers will be checked for any arithmetical errors in computation and summation. Errors will be corrected by the evaluation committee as follows:

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, **the unit price as quoted will be the price taken into account**. Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

Information concerning price

- The prices quoted must be fixed and not revisable for the first year of the contract (see article I.3.3 of the draft Framework contract in Annex B).
- Prices must be quoted in EUR and include all expenses (without VAT);
- 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 shall therefore not be included in the calculation of the price quoted.

5.4 Financial evaluation

Only tenders scoring seventy (65) points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award sub-criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** as a **sum** of the total prices offered in the **Price schedule tables 1, 2, 3 and 4** (see point 5.3 and Annex H).

For equality treatment among the tenders, the **table 5 will not be taken into account** for the financial evaluation, but the relevant offer will be included in the contract to be signed with the winning tenderer.

The tenders are awarded points for the Total Price offered by using the following formula:

$Financial\ score = (cheapest\ Financial\ Proposal / Financial\ Proposal\ of\ the\ tender\ considered) * Y.$
Y = price weighting=30 (see the complete formula under point 5 above)

6 Information on presentation and content of tender

It is important that tenderers 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:

- ✓ cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- ✓ the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C;
- ✓ the selection criteria documents as requested in points 3.2, 4.1, 4.2
- ✓ Questionnaires 1 – 4 as found in Annex G
- ✓ Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- ✓ Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- ✓ 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

In the case of tenders submitted by groupings (consortia) or involving contribution by subcontractors, envelope A should also contain all relevant documentation as requested in points 4.1 and 4.2 respectively (with reference to points 3.1, 3.2 and 3.3).

6.2 Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal (Annex H) containing all information requested in point 5.4.

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

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

(Given as separate Word file)

ANNEX D

LEGAL ENTITY FORM

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/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Legal Entity Form to be completed and signed by a representative of the tenderer (name and function) authorised to sign contracts with third parties. It should not be signed by sub-contractors (if any).

ANNEX E

FINANCIAL IDENTIFICATION FORM

To be downloaded, depending on the nationality of the tenderer, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_fr.cfm

and completed and signed by an authorised representative of the tenderer (with indication of name and function), but not by subcontractors.

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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

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s) entitled to sign contract)	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Exclusion Criteria Declaration (including those of consortium members and subcontractors, if applicable)	3.1, 6.1 & Annex C	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1-4 (Annex G)	3.2, 3.2.1, 3.2.2, 4.1; 6.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (models 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2, 6.1 & Annex J	☐	☐	
- Legal Entity Form	3.3, 6.1 & Annex D	☐	☐	
- Financial Identification Form	6.1, Annex E	☐	☐	
- this Checklist	6.1 & Annex F	☐	☐	
<u>Envelope 'B' must contain</u>				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.1, 5.2 & 6.2	☐	☐	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.3, 6.3,	☐	☐	

The tenderers should also ensure that:

☐	the 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 duly authorised agent.
☐	the offer is perfectly legible in order to rule out any ambiguity.
☐	the 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.

ANNEX G - QUESTIONNAIRES

(Given as separate Word file)

ANNEX H

FINANCIAL PROPOSAL

(Given as separate Word file)

ANNEX I

MODEL 1 - POWER OF ATTORNEY

Agreement / Power of Attorney

MODEL 2 - POWER OF ATTORNEY

Agreement / Power of Attorney

(Given as separate Word file)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate Word file)