


CEDEFOP

 European Centre for the Development
of Vocational Training

Area Resources - Finance and Procurement, Procurement Service

 Thessaloniki, 27/07/2011
RS/PRO/DELE/2011/0558

OPEN INVITATION TO TENDER

AO/ECVL/MILA/Guidance-for-active-age-management/012/11

‘Guidance for active age management – Supporting longer working lives of older workers’
Ref.: Contract notice - 2011/S 142-235046 of 27/07/2011

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, 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:

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.*

Do not attach your offer to any of the above information 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)**):

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaïdis
123, Europe Str, GR-57001 Thessaloniki-Pylea,
PO Box 22 427 - 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/ECVL/MILA/Guidance-for-active-age-management/012/11

‘Guidance for active age management – Supporting longer working lives of older workers’

Name of tenderer:

NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in **point 6** of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible. 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:

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 the date and time as specified in the timetable in point 8 below. 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 up to the closing date for receipt of tenders.

After the final date for submission of tenders:

- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the final date for submission of tenders.
- Tenderers should not 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 will lead to rejection of the tender. Any such need identified by the Evaluation Committee 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).

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.
- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the tenders have been opened.
- If the 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. The tenderers' replies must serve solely the purpose to provide the Evaluation Committee with a clarification regarding the offer in relation to the technical proposal or concerning obvious clerical errors in the financial offer. Neither the technical content of the tender nor the financial offer may be changed.
- In case the tenderer alters the total financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	15 September 2011	< N/A >
Last date on which clarifications are issued by Cedefop	as soon as possible	< N/A >
Deadline for submission of tenders (hand delivered)	26 September 2011	17h00 >
Deadline for submission of tenders by post / courier	26 September 2011	< N/A >
Validity of the tenders	26 March 2012	< N/A >
Tender opening session	10 October 2011	11h00

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 are 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 signature of the contract with the successful tenderer.

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 the tender procedure.

Yours sincerely,

signed George Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/MILA/Guidance-for-active-age-management/012/11

‘Guidance for active age management – Supporting longer working lives of older workers’

Tender Specifications

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Introduction to Cedefop:

Strengthening European cooperation in vocational education and training policy

- 1) Founded in 1975 (1) 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 (2) 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.

(¹) 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.

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

Informing European vocational education and training (VET) policies

- 4) Cedefop analyses and reports on the policies Member States are putting in place to provide the skills we need.
- 5) Cedefop is helping to design, develop and implement joint European approaches. For example, Cedefop is supporting work on tools such as Europass, the European qualifications framework and European credit system for vocational education and training to make it easier to study and work in another Member State. Cedefop is also helping develop common European principles for validating non-formal learning, improving vocational guidance, and assuring the quality of training.
- 6) All of these aim to help people to keep learning throughout their careers, and make use of all their learning, regardless of how it has been acquired.

Interpreting European trends in skills and learning

- 7) Cedefop is working on a common approach to forecasting demand and supply of skills in Europe. We need to understand more about how the demand for skills will change and how this affects what we need to learn. The better we can anticipate skill needs, the better our policies will be.
- 8) Cedefop is also examining how people acquire knowledge and skills and how this learning is measured. Valuable and relevant learning takes place in different settings, including work, during leisure time and abroad, as well as at schools, colleges and universities. Cedefop is looking at what this means for institutions, curricula, teaching and training and for assessing knowledge and skills.

Assessing the benefits of VET

- 9) Investment by firms to develop skills can lead to greater productivity, profitability and even stock market performance. Individuals also benefit from training, as it helps workers improve their career and employment prospects, and protects those who are marginalised or otherwise at risk. Yet public and private investment in skills is relatively low in Europe.
- 10) Demonstrating the positive returns to vocational education and training may encourage both enterprises and individuals to invest in it. Cedefop is also looking at the best ways to measure investment in training to calculate its benefits, and at ways of using statistics and developing new benchmarks and indicators.

Raising the profile of vocational education and training

- 11) Training is more fragmented than general education and so is not always heard. To raise the profile of training and increase awareness of its role in lifelong learning, Cedefop disseminates clear, reliable, timely, and - where possible - comparable information to its target groups, namely policy-makers, researchers and practitioners, through electronic and printed media.
- 12) One of the best ways to disseminate information about training is still through personal contact. Through its study visits and conferences, Cedefop brings together people with very different backgrounds and experience to learn from each other and generate new ideas.

Cedefop's information

13) Cedefop's web portal 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.

14) Information about Cedefop's publications, many of which can be downloaded, can be found at the <http://www.cedefop.europa.eu/EN/publications.aspx>. 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.

15) Cedefop hosts and organises conferences and events throughout the year. Cedefop also manages several networks to exchange experience and debate, generate ideas and examine themes. These include Agora conferences, two or three are hosted in Thessaloniki each year. Study visits, 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 another country. In working to improve VET, Cedefop cooperates with many organisations and has several networks to collect and disseminate information, exchange experience, stimulate debate and generate ideas. Cedefop's major networks include:

- (a) ReferNet (European network of reference and expertise in VET) is Cedefop's primary source of information on VET developments in Member States. ReferNet comprises national consortia consisting of representatives of VET organisations in each Member State led by a national coordinator;
- (b) Skillsnet (network on early identification of skill needs) brings together researchers, policy-makers, social partners and practitioners to exchange information about activities on skill needs analysis and anticipation at European and international levels;

Management, resources and internal controls

16) Cedefop's administration makes an important contribution to achieving Cedefop's operational objectives. It maintains the physical environment and ICT architecture and supports colleagues in procurement, contract and financial procedures. Further, in its dealings with outside organisations and contractors it projects Cedefop's image. Cedefop, in managing its human and financial resources, applies modern and efficient management techniques, in full compliance with the regulations.

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

1 Overview of this tender

In submitting his tender, 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 may be, which he hereby waives. 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 tender containing all the required information and documentation may lead to the rejection of the tender. No account can be taken of any reservation expressed in the tender as regards the tender dossier (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 may result in the immediate rejection of the tender without further evaluation.

1.1 Description and type of the contract

a) Title of the contract: **‘Guidance for active age management – Supporting longer working lives of older workers’**

b) Short description of content of this contract:

The aim of this Europe-wide study is to investigate how lifelong guidance is embedded in the European Union and national policies and strategies on active ageing as well as in employer’s age management strategies supporting older workers’ (55+) lifelong learning and skills development, and within this context to what extent various guidance services available to this target group *in real terms* address the issue of staying longer in employment (instead of making an early exit from working life).

c) Type of contract: **Service Contract**

1.2 Place of delivery or performance

The tasks must be completed outside Cedefop in 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.

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 **180,000** Euro (excluding VAT).

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party (estimated date late November or early December 2011), and shall have a duration of **15 months** (until February-March 2013).

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.

2 Terms of Reference

2.1. Introduction

The European Union and the individual Member States have been addressing the demographic challenge of an ageing society³ more systematically ever since the Council resolution on the employment of older workers (1995)⁴, which was the first political declaration at EU level of the need for concrete action in this field. More specifically, this resolution called on the European Commission to organise an exchange of information, experience and good practice concerning the employment of older workers. During the past 16 years, diverse EU and national level policy and strategy initiatives have sought to raise awareness of issues linked to an ageing work force, and at the same time to encourage all policy makers and key stakeholders to initiate better collaboration on supporting older workers' labour market participation.

Against this background, the European Parliament has taken a decision on the European Year of Active Ageing and Solidarity between Generations 2012⁵. The main aim of this European Year⁶ is to support the efforts of Member States⁷, their regional and local authorities, social partners and civil society in promoting active ageing as well as mobilising the potential of the fast growing population in their late 50s and above. In simple terms, active ageing means creating better opportunities and working conditions to enable older workers to play their part in the labour market, combating social exclusion by fostering active participation in society, and encouraging healthy ageing.

This call for tenders on *Guidance for active age management - Support longer working lives of older workers (55+)* is placed within the overall framework of the European Year of Active Ageing and Solidarity between Generations 2012. The contracted study will specifically focus on how guidance can support active age management of older workers in the context of working and learning.

2.1.1. Active ageing and the EU labour market

The overall EU policy agenda⁸, and in particular the Europe 2020 Strategy⁹, are addressing the ageing workforce from the perspectives of employment, pensions and gender equality. These policies and strategies call for establishing new structures and flexible approaches as to better adapt to the increasing number of older workers in working life and in society. However, due to the global economic crisis – that has been influencing the dynamics of the European labour markets since 2008 – most national labour markets are currently not well balanced (e.g. there are skills shortages in some regions, sectors and occupations coinciding with relatively high levels of unemployment).¹⁰ In many cases this results in

³ Eurostat (2011). Projected old-age dependency ratio (%): This indicator is defined as the projected number of persons aged 65 and over expressed as a percentage of the projected number of persons aged between 15 and 64. For EU27, the projected old-age dependency ratio was 25.9% in 2010. Forecasts for: 2025 34.2%; in 2040 45.4%; in 2055 52.5%. Percentage rate of the population aged 65 and over in 2050 (EU27): 29 %.

<http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&language=en&pcode=tsdde511&plugin=1>

⁴ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:41995X0902:EN:HTML>

⁵ Decision of the European Parliament and of the Council on the European Year for Active Ageing (2010) <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010PC0462:EN:NOT>

⁶ European Commission website of the Year of Active Ageing <http://ec.europa.eu/social/ey2012.jsp?langId=en>

⁷ The Spanish, Belgian and Hungarian Presidencies (2010-2011) have been focusing on supporting various initiatives in the context of population ageing, and in that way they have contributed with preparatory work to the European Year on Active Ageing and Intergenerational Solidarity in 2012.

⁸ European Commission (2010). Lisbon Strategy evaluation document. Commission staff working document. http://ec.europa.eu/archives/growthandjobs_2009/pdf/lisbon_strategy_evaluation_en.pdf

⁹ European Commission (2010). Europe 2020: European strategy for smart, sustainable and inclusive growth. <http://libserver.cedefop.europa.eu/vetelib/2010/72998.pdf>

¹⁰ European Commission (2010). Commission staff working document accompanying the Communication on European Disability Strategy 2010-2020: A Renewed Commitment to a Barrier-Free Europe. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=SEC:2010:1323:FIN:EN:DOC>

local/regional labour markets functioning improperly, especially in relation to older workers' employment.

As a consequence of the crisis, the Member States did not manage to reach the target of having 70% of the working age population in employment by 2010¹¹. However, regardless of the currently high unemployment¹² rates across Europe, the ambitious goal of the European Union is to achieve an employment rate of 75%¹³ for all people between 20 and 64 by 2020. This rate can only be reached by adopting measures to create new jobs and to increase labour market participation (i.e. engaging women, young and older workers to a much greater degree than previously). Currently the targeted employment rate for older workers (55-64 years old) in the EU27 is 50%. In 2010, the Member States managed to increase the employment rate of older workers to 46.3%¹⁴ (compared to 36.9% in 2000)¹⁵. This low employment rate is partly due to the lack of solid practices of age management in work places and labour markets, and also a result of the currently existing early and/or disability retirement schemes.

Therefore, the key policy goal is to manage to create an overall environment that encourages older workers to stay in employment *rather* than make an early exit from the labour market (e.g. because of low demand from employers, low levels of upskilling, lack of assistance for job search, referral to early retirement benefits, insufficient reintegration and re-training provision after redundancy). To this end, the improvement of working conditions as well as more effective incentives for working longer will be required (e.g. access to lifelong learning; adaptation of work places to older workers' health status; financial benefits such as tax privileges, age management strategies at company level, etc.).¹⁶

Finally, to improve the overall functioning of national labour markets, the New Skills for New Jobs initiative (2009) aims at establishing a mechanism for monitoring employment trends as well as long-term skills supply and demand in Europe.¹⁷ But as governments *alone* cannot take forward employment policies for older people, cooperation with the social partners as well as support of business and civil society actors to promote the employment of ageing workers are necessary. Such cooperation is also expected to combat negative cultural attitudes and age discrimination¹⁸ towards older workers in the labour market¹⁹ and in workplaces.

¹¹ European Commission (2011). Draft Joint Employment Report – Annual Growth Survey (Annex 3).

http://ec.europa.eu/economy_finance/articles/eu_economic_situation/pdf/2011/com2011_11_annex3_en.pdf

¹² During high unemployment there is often a tendency to see reducing the number of older workers as a way to create jobs for younger people. However, experience has shown that the use of early retirement to free up new jobs for the unemployed has not been an effective solution.

¹³ It is one of the five key elements of the EU's growth and jobs strategy, Europe 2020.

¹⁴ In the age group of 55-64 years, European men show a much higher employment rate (54.6%) than European women (38.6%) in 2010.

¹⁵ Eurostat (2011). Employment rate of older workers by gender.

<http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tsiem020> There are huge variations between the EU27 countries concerning the older workers' labour market participation (Sweden in the lead with 70.5% whereas Malta "only" has an employment rate of 30.2% for the 55-64 years old). For EU candidate countries the differences are even more extreme: Iceland with 79.8% compared to Turkey with a modest rate of 29.6%.

¹⁶ Council of the European Union (2010). Conclusions on Active Ageing. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lisa/114968.pdf

¹⁷ Council of the European Union (2009). Conclusions on New Skills for New Jobs - Anticipating and matching labour market and skills needs. http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/lisa/106549.pdf

¹⁸ European Commission (2009). Special Eurobarometer 317. Discrimination in the EU in 2009. http://ec.europa.eu/public_opinion/archives/ebs/ebs_317_en.pdf The greatest contribution of the crisis to an increase in discrimination levels is on the grounds of age. There is a strong link between the economic crisis and the increased perception of age discrimination: 64% of European citizens indicate that the economic crisis will contribute to an increase of discrimination on the grounds of age in the labour market. Just under a third (29%) disagrees and less than a tenth (7%) doesn't know.

¹⁹ Discrimination in employment and occupational matters has been prohibited on the grounds of sex, racial or ethnic origin, religion or belief, disability, age and sexual orientation. A set of anti-discrimination measures was adopted by the EU Council of Ministers in 2000, including a directive on discrimination in employment (2000/78/EC) which establishes a general framework for equal treatment in employment, occupation and vocational training. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32000L0078:EN:NOT>

2.1.2. Adult participation in lifelong learning

As most jobs throughout Europe are becoming more knowledge- and skills-intensive, Europe will have to continue investing in education and training to increase its human capital as well as to remain competitive in the global economy in the future. Skills upgrading is absolutely vital as in 2010 about four persons out of ten (EU average 38.4%) in the age group 55-64 years demonstrated a low educational attainment²⁰. Although this rate has steadily gone down from 51.9% (in 2000), the skills levels of low-skilled workers will have to be further raised as to enable them to better adapt to the changing demands in the labour market.²¹ Also the Bruges Communiqué (2010)²² attaches a high priority to adult learning and labour market integration of the low qualified and other at-risk groups.

In the past years, the Member States have been introducing skills and competence strategies not just to help people into jobs, but to help break the cycle of low skills, short-term jobs and low wages. As part of these strategies many countries have taken concrete measures to improve the assessment and recognition of skills acquired throughout life as well as to support adults' participation in education and training.²³ For example, a national system of recognition, validation and certification of competences (RVCC) was created for adults in Portugal in 2001. It has turned out to be a highly successful measure in helping adults with low educational attainment and low skills levels to improve their qualifications.²⁴

At present, adult participation in lifelong learning varies greatly and is unsatisfactorily low in many EU countries. With the average working age rising across Europe, a corresponding increase in adult learning by older workers should therefore become a reality. With this in mind, the EU has set a target at engaging an average of at least 15% of all 25-64 year old adults more actively in lifelong learning by 2020²⁵ (in 2010 the share was a mere 9.1%²⁶). In order to increase the participation rates in lifelong learning across Europe, it is necessary to understand the reasons lying behind the currently low attendance rates. As an attempt to explain the low participation rates in adult learning, researchers²⁷ have identified three main groups of barriers:

- Situational barriers — those arising from one's situation in life (e.g. lack of time, because of work, family responsibilities, etc.);
- Institutional barriers — practices and procedures hindering participation (e.g. fees, lack of money, absence of evening courses, entrance requirements, limited courses offerings, etc.); and
- Dispositional barriers — motivation, attitudes and dispositions towards adult education and learning.

²⁰ Eurostat (2011). Persons with low educational attainment, by age group % (55-64 years): This indicator is defined as the percentage of people aged 25 to 64 with an education level ISCED (International Standard Classification of Education) of 2 or less. ISCED levels 0-2: pre-primary, primary and lower secondary education.

<http://epp.eurostat.ec.europa.eu/tgm/refreshTableAction.do?sessionId=9ea7971b30db034d43783dcb407abe9d8f2a71b86787.e34RaNaLaxqRay0Lc3uLbNiNa30Ke0?tab=table&plugin=1&pcode=tsdsc430&language=en>

²¹ Council of the European Union (2008). Conclusions on adult learning.

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:140:0010:0013:EN:PDF>

²² Bruges Communiqué (2010) on enhanced European Cooperation in Vocational Education and Training for the period 2011-2020. http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bruges_en.pdf

²³ Cedefop (forthcoming 2011). Lifelong guidance across Europe – Reviewing policy progress and future prospects.

²⁴ Cedefop (forthcoming 2011/12). Working and ageing – Guidance and counselling for mature learners.

²⁵ The benchmarks to be achieved by 2020 are (ET 2020): participation in early childhood education (*at least 95%*); insufficient abilities of 15-year olds in literacy mathematics and science (*less than 15%*); early leavers from education and training (*less than 10%*); 30-34 year olds with tertiary educational attainment (*at least 40%*); and 25-64 year old adults participating in lifelong learning (*at least 15 %*).

²⁶ Eurostat (2011). Lifelong learning by gender. Percentage of the adult population aged 25 to 64 participating in education and training.

<http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&language=en&pcode=tsiem080&plugin=1>

²⁷ Rubenson, K., and Xu, G. (1997). Barriers to participation in adult education and training: Towards a new understanding. In P. Bélanger et A. Tuijnman (editors.). New patterns of adult learning: A six-country comparative study. Oxford: Pergamon Press.

An individual's decision on not to actively pursue learning can be due to one of the above barriers or eventually a combination of all/several of them. But as evidence shows, adults/older workers are not always aware of the learning and qualification opportunities available to them, and they may have a restricted view about their own skills and know-how. In addition, the learning opportunities for skills development available in formal, non-formal and informal settings might not be transparent enough or easily accessible for adults in working life, nor visible or attractive enough for the employers to promote their personnel's engagement in learning (see footnote 24). Further, as the Cedefop report²⁸ on workplace learning reveals, adult learning providers together with employers have a key role in creating a culture that is favourable to learning and that manages to support (older) workers in attaining the skills and in reaching the skills levels that are needed for successful employment and career progression. For this purpose, the Agenda for new skills and jobs emphasises, among other things, that careers guidance should be easily available for all employees to have a better access to lifelong learning as well as validation of non-formal and informal learning²⁹.

2.1.3. Active age management in the context of learning and working

The European Commission³⁰ refers to demographic ageing as one of the main challenges that the Member States will have to face in the coming years. Considering the diversity of the ageing population in Europe, it is essential to establish an overall framework for age management that interlinks the EU and national levels. In this context, the Council conclusions on active ageing (2010)³¹ invite the Member States, on the one hand, to encourage companies to introduce age management strategies that will improve their competitiveness by harnessing the experience of older workers, and on the other hand, to strengthen intergenerational solidarity to enhance social cohesion and the development of a participatory working culture to which both women and men of all ages³² contribute.

The complex concept of age management³³ is described by the European Foundation for the Improvement of Living and Working Conditions (Eurofound) in terms of supporting employability (i.e. keeping the workforce skilled, motivated and able-bodied). To operationalise the concept, five main dimensions of age management have been identified in organisations: 1) job recruitment and exit; 2) training, development and promotion; 3) flexible working practice; 4) ergonomics and job design; and 5) changing attitudes towards ageing workers. Further, in an employer's integrated age management strategy the emphasis should be on the prevention of age management problems rather than reactive problem solving; on the whole working life and all age groups (not only older workers); on a holistic approach to effective age management (encompassing all life areas); and on a remedial provision for older workers (e.g. missing out on specific skill training, health deteriorating as a result of their work).

To make progress in the area of age management, public and private sector employers should be encouraged to take a longer term view with regard to human resources development (such as training strategies, skills shortages and succession planning). Employers should realise the added value they may obtain from successfully implementing age management strategies and setting up related good practices. Factually, above average outcomes can only be achieved when the overall context is sympathetic to ageing. Age management is not just a matter for employers and employees, but it should be embraced by all key players (see footnote 31). National, regional and local authorities, the social partners and other stakeholders (such as employers, NGOs) should to a greater extent commit themselves to promoting active ageing, to developing common principles for age management as well as to addressing

²⁸ Cedefop (2011). Learning while working. Success stories on workplace learning in Europe. http://www.cedefop.europa.eu/EN/Files/3060_en.pdf

²⁹ European Commission (2010). Communication on An Agenda for new skills and jobs: A European contribution towards full employment. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF>

³⁰ European Commission (2006). Communication on the demographic future of Europe: from challenge to opportunity. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0571:FIN:EN:PDF>

³¹ Council of the European Union (2010). Conclusions on Active Ageing. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lssa/114968.pdf

³² Intergenerational learning bridges age differences, enhances the transmission of cultural values and promotes the worth of all ages. Several studies have shown that young people who learn with older people have more positive and realistic attitudes about the older generation.

³³ Eurofound (1997). Combating Age Barriers in Employment - Portfolio of Good Practice. Dublin.

the growing diversity of older workers while designing and implementing employment, education/training, guidance and health policies. To this end, the exchange of experiences and success stories as well as knowledge sharing become highly crucial at all levels of governance as to eliminate obstacles to active ageing (see footnote 30).

2.1.4. Lifelong guidance³⁴ to support longer working lives

For older workers in many countries the current labour market situation and reduced job opportunities might appear as threatening. The fact is that the global economic crisis has challenged many ageing workers as they have experienced job losses (e.g. through restructuring of businesses) and are now forced to cope with unemployment and transitions between jobs, careers, sectors and industries as well as eventually with the return to education and training for additional learning and skills upgrading.³⁵ All the above-mentioned circumstances together have created an increased demand among ageing people for information, advice, career guidance and counselling in the Member States.

To this end, the EU countries have introduced policy and strategy level measures to enhance the access to guidance, learning and working for user groups with special needs. This action has resulted in improving the service delivery as well as developing guidance practices specifically targeting the risk groups (such as older workers). Older people are a heterogeneous group with different abilities and qualities, and thus they usually are in a more regular need for more individualised guidance. Therefore, careers guidance should more strongly rely on applying multiple measures and special expertise to cater for the needs of the ageing workers. Hence, new types of learning and more tailor-made career pathways for older workers (that match their skills and work situation) should be offered, and information and guidance about how to access them should be made easily available (see footnote 23).

Despite progress made in addressing the needs of older workers, several gaps in the information and guidance service provision have been identified. One big challenge to be further explored is how guidance could better support longer working lives of ageing people (within the national framework of key policies in which ageing is a transversal element) and how private and public employers' strategies on active age management could contribute to this. The retention of older workers in employment is *always* linked to questions about how to make lifelong learning attractive for an ageing workforce and employers alike as well as how to further improve related support services for individual older learners (e.g. implementing mentoring schemes, developing career management skills, facilitating intergenerational learning at work, etc.).

For the time being the public employment services (PES) are gradually assuming a more dynamic role as an active labour market manager in relation to unemployed people, older workers and other risk groups. This more client-oriented approach includes priorities such as increasing labour market transparency, providing new support processes (e.g. career management services, personal learning plans), offering information and guidance services through a multichannel delivery mechanism (i.e. online, telephone and face-to-face services) as well as addressing special cases such as guidance support for redundancy and outplacement.³⁶ Finally, only with organisational initiatives to develop skills and employability of older workers and with well-functioning cooperation between governments, social partners, public employment services, adult learning providers and employers' strategies of responding to work force ageing can be successful. Guidance support is the key to adapting employment opportunities to an ever more age-diverse workforce.

³⁴ Council of the European Union (2008). Resolution on better integrating lifelong guidance into lifelong learning strategies. The resolution identified four priority areas: 1) developing career management skills; 2) widening access to guidance services for all citizens; 3) establishing quality assurance mechanisms; 4) encouraging policy coordination and cooperation.

http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/educ/104236.pdf

³⁵ Cedefop (2010). A bridge to the future: European policy for vocational education and training 2002-10. http://www.cedefop.europa.eu/EN/Files/3058_en.pdf

³⁶ European Commission (2009). Draft Joint Employment Report (JER) 2009/2010 (6575/10). <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2009:0674:FIN:EN:PDF> ; Cedefop (2010). Socially responsible restructuring: effective strategies for supporting redundant workers. http://www.cedefop.europa.eu/EN/Files/6107_en.pdf

2.1.5. Definitions of key concepts

The following concepts as defined below are listed as to provide a better orientation for understanding as well as for operationalising the research problem at hand. They are only meant to give a starting point for the tenderers and not to be considered as the only appropriate ones.

Active ageing is defined as the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age. It allows people to realise their potential for wellbeing throughout their lives and to participate in society according to their needs, desires and capabilities, while providing them with adequate protection, security and care when they need assistance. While this definition includes the notion of continuing activity in the labour force, it also encompasses continuing participation of older people in society (i.e. in social, economic, cultural, spiritual and civic affairs). Maintaining autonomy and independence for the older people is a key goal in the policy framework for active ageing. (World Health Organization, 2002)³⁷

Age management covers the various dimensions by which human resources are managed within organisations with an explicit focus on ageing and, also, more generally, the overall management of the workforce ageing via public policy or collective bargaining. The interventions in age management are the kinds of things that organisations can do, in other words, the tools of age management. These tools can be classified in the following categories: changing attitudes; recruitment; training, development and promotion, wage policy; ergonomics and job design; health and well being; exit policy; and redeployment. (Walker, 1997)³⁸

Career management skills refer to a whole range of competences which provide structured ways for individuals and groups to gather, analyse, synthesise and organise self, educational and occupational information as well as the skills to make and implement decisions and transitions. (Sultana, 2009)³⁹

Employability is the combination of factors which enable individuals to progress towards or get into employment, to stay in employment and to progress during career. Employability of individuals depends on (a) personal attributes (including adequacy of knowledge and skills); (b) how these personal attributes are presented on the labour market; (c) the environmental and social contexts (i.e. incentives and opportunities offered to update and validate their knowledge and skills); and (d) the economic context. (Cedefop, 2009)⁴⁰

Learning-to-learn competence is the ability to pursue and persist in learning, to organise one's own learning, including through effective management of time and information, both individually and in groups. This competence includes awareness of one's learning process and needs, identifying available opportunities, and the ability to overcome obstacles in order to learn successfully. This competence means gaining, processing and assimilating new knowledge and skills as well as seeking and making use of guidance. Learning to learn engages learners to build on prior learning and life experiences in order to use and apply knowledge and skills in a variety of contexts: at home, at work, in education and training. Motivation and confidence are crucial to an individual's competence. (European Parliament; Council of the European Union, 2006)⁴¹

³⁷ WHO (2002). Active ageing – A policy framework.

http://whqlibdoc.who.int/hq/2002/WHO_NMH_NPH_02.8.pdf

³⁸ Walker, A. (1997). Combating Age Barriers in Employment – A European Research Report, Eurofound, Dublin.

³⁹ Sultana, R. (2009). Career management skills: Reflection note. Vilnius 5-7 May 2009 (European Lifelong Guidance Policy Network (ELGPN) Work package 1).

http://ktl.jyu.fi/img/portal/14962/WP1_Vilnius_Reflection_Note-Final.pdf?cs=1243246455

⁴⁰ Cedefop (2009). Terminology of European education and training policy.

http://www.cedefop.europa.eu/EN/Files/4064_en.pdf

⁴¹ European Parliament; Council of the European Union (2006). Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning. Official Journal of the European Union, L394, 30.12.2006, p. 10-18. Available from Internet: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:394:0010:0018:en:PDF>

Life course⁴² (Heinz and Krüger, 2001) examines the interaction between structural constraints, institutional rules and regulations and individual's subjective meanings as well as decisions over time. Although certain aspects govern the life course (e.g. societal norms defining a proper life course, legal restrictions, conventions and labour market possibilities), there is no generally agreed timetable for the life course. It puts an emphasis on lifetime earnings and career prospects as well as on how aggregate social changes may affect the future (e.g. postponed parenthood, staying in education, being long-term unemployed, etc.). Decisions and choices made earlier in life (e.g. in youth) may change the outlook of life at that moment and even have an effect later on in life (Nilsson, 2001). A life course perspective on ageing recognises that older people are not one homogeneous group and that individual diversity tends to increase with age. Interventions that create supportive environments and foster healthy choices are important at all stages of life (WHO, 2002).

In the context of lifelong learning, **lifelong guidance** refers to a range of activities that enables citizens of any age and at any point in their lives to identify their capacities, competences and interests, to make educational, training and occupational decisions and to manage their individual life paths in learning, work and other settings in which these capacities and competences are learned and/or used. Lifelong guidance covers information and advisory services, tutoring, mentoring, advocacy, coaching, guidance, and counselling. (Council resolution, 2004)⁴³

The definition of **older workers** generally used in an EU context relates to those aged 55 to 64 years. For example, the employment rate of older workers (total, females, males) is defined by Eurostat⁴⁴ as follows: the number of persons (females, males) aged 55-64 in employment as a share of the total population (females, males) of the same age group. The OECD (2000)⁴⁵ definition of an older worker is 55+ years.

2.2. General purpose

The overall purpose of this study is to investigate how lifelong guidance is embedded in the European Union and national policies and strategies on active ageing as well as in employers' age management strategies supporting older workers' (55+) lifelong learning and skills development, and within this context to what extent various guidance services available to this target group *in real terms* address the issue of staying longer in employment (instead of making an early exit from working life).

With the **ultimate goal of extending older workers' careers** (until the statutory retirement age or even beyond) the study aims, in particular, at:

- exploring the way the European Union as well as the national policy and strategy frameworks address the ageing workforce across Europe (EU27 and 3 EEA countries); specific focus will be on ageing as a transversal element in policies and strategies linked to employment, education-training and social inclusion of older workers.
- examining cooperative arrangements between social partners, public employment services, regional and local authorities, employers, adult learning providers and civil society actors in terms of how they provide/contribute to providing guidance support for older workers in relation to lifelong learning, skills development and career management.
- identifying good practices on/innovative approaches to designing and implementing age management strategies in organisations with guidance as an integral element; such strategies should at least have two specific features: on the one hand, they should be promoting (lifelong)

⁴² Heinz, W. R. & Krüger, H. (2001). Life Course: Innovations and Challenges for Social Research. In Current Sociology 49, 29-45; Nilsson, K. (2001) Migration among Young Men and Women in Sweden. GERUM kulturgeografi 2001:2; WHO (2002). Active Ageing - A Policy Framework http://whqlibdoc.who.int/hq/2002/WHO_NMH_NPH_02.8.pdf

⁴³ Council resolution (2004) on Strengthening Policies, Systems and Practices in the field of Guidance throughout life in Europe. http://ec.europa.eu/education/policies/2010/doc/resolution2004_en.pdf

⁴⁴ Eurostat quality profile (2007). Indicator for the employment rate of older workers. http://epp.eurostat.ec.europa.eu/portal/page/portal/structural_indicators/documents/em014_-16_Employment_rate_of_older_workers.pdf

⁴⁵ OECD (2000). OECD Employment Outlook. Paris: OECD.

learning and career development opportunities in the work place, and on the other hand, be offering flexible work practices to the ageing staff members with the view of keeping them longer in employment.

- delivering **key messages** for EU and national policy- and decision-makers, for employers as well as for guidance experts as to support future action in the areas of policy and practice with the aim to strengthen the role of guidance in active age management strategies at national level as well as to support employers in setting up and implementing such strategies in workplaces across Europe.

The overall study consists of the following tasks that reflect the research objectives described above.

1. **A literature review** (desk research) that gives the rationale for the study and outlines the overall context highlighting the most recent developments at EU and national levels;
2. Two sets of **case studies of good practices** (a total of 24 descriptions) on cooperative arrangements between key actors (12) as well as on employers' age management strategies in organisations (12);
3. A set of **conclusions** as well as **key messages** targeting policy and practice in the area of guidance supporting active age management.

This study (contract) is embedded in the systematic research work undertaken by Cedefop in the respective fields (e.g. guidance for active ageing/older workers as well as guidance for lifelong learning), and is part of Cedefop's Lifelong Guidance activities and Cedefop's medium-term priorities for 2009-2011 and 2012-2014.

2.3. Description of the tasks and the methodology

The contractor, in close cooperation with his/her research team, should carry out the three main tasks as listed above and of which further details will be provided in the following sections. Throughout the execution of these tasks, the contractor will operate under the supervision of Cedefop's project manager/s responsible for this research project.

2.3.1. Literature review (desk research)

The awarded contractor shall undertake a literature review (desk research) in order to contextualise the research work in an EU policy and strategy framework as well as outline recent developments in the Member States. The literature review should rely on recent EU policy and strategy documents (2008-2012) and a representative presentation about the developments in the Member States is to be based on relevant national policy and strategy documents. The literature review shall give a good overview of the situation in the European Union (EU) and European Economic Area (EEA) countries as regards:

a) Ageing, ageing workforce and active age management. In particular, the review should analyse how the EU and national level policies and strategies on lifelong learning and employment (with ageing as a cross-cutting dimension) aim at creating proper conditions for mobilising the potential of older workers by encouraging their acquisition of new skills as well as facilitating their more regular participation in lifelong learning in order to support longer careers. If possible, national/European/international research evidence available should further illuminate this analysis and discuss the prerequisites to successfully engaging older workers in the labour force in pursuing emerging learning and career opportunities.

b) Lifelong guidance. Within the above EU/national policy and strategy framework, the review should explore what the overarching and explicitly stated goals of lifelong guidance are in relation to older workers in the context of extended working lives. Moreover, the review should look into the way the policy and strategy documents (while recognising the diversity of the 55+ age group) address the specific information, advice and guidance (IAG) needs of older workers, and find out to what extent age-sensitive IAG services are put forward in the policies and strategies in the Member States in order to help older workers remain in employment and be offered continued learning and employment opportunities (as to avoid early retirement).

Selected examples of policy/strategy level initiatives and/or measures should be identified and highlighted on both points *a*) and *b*) above. The size of the literature review/analysis should be approximately 35-40 pages. This desk research will consider and present in a synthesised manner the main trends, success factors and challenges as regards the design and implementation of employment, education, training and guidance policies and strategies that take a positive stand on active ageing, age management as well as supporting longer careers of older workers.

2.3.2. Case studies of good practices

The contractor shall identify, analyse and report on **24 case studies** (12 for each of the sub-themes *a* and *b* below) in the selected countries (see table below), which can be considered as examples of good guidance practices (against the aspects highlighted below) on *cooperative arrangements between key stakeholders* as well as on *employers' age management strategies*. The common crosscutting element in these good practices is that with a strong presence of guidance they aim at increasing the employment rate of older people and supporting their longer working lives, for example, by means of offering opportunities for learning and career development.

In the sample, the contractor shall include the **most recent initiatives** established and implemented (time span 2006-2011) with national/regional funding and/or with the support of European programmes, including European Social Fund.

A **balanced geographical representation** of countries should be ensured in selecting the case studies as well as presenting the related findings. In the table below, the 27 European Union Member States are divided into four groups (1-4) and the European Economic Area countries (Iceland, Liechtenstein, Norway) form group No 5. From each group of countries the contractor should select 1-3 countries for the case studies as indicated in the last row of the table. A proposal for the selection of countries with appropriate justification will have to be included in the tenderer's technical proposal to Cedefop.

Country division for case studies⁴⁶.

GROUP 1 EU27	GROUP 2 EU27	GROUP 3 EU27	GROUP 4 EU27	GROUP 5
Denmark	Austria	Bulgaria	Cyprus	Liechtenstein
Finland	Belgium	Czech Republic	France	Norway
Sweden	Germany	Hungary	Greece	Iceland
Estonia	Ireland	Poland	Italy	
Latvia	Luxembourg	Romania	Malta	
Lithuania	Netherlands	Slovak Republic	Portugal	
	United Kingdom	Slovenia	Spain	
2 countries to be selected	3 countries to be selected	3 countries to be selected	3 countries to be selected	1 country to be selected

In addition to presenting the complete good practice results from the 12 core countries, references to identified good practices from all countries listed in the table above are to be made in the final report as well.

⁴⁶ The rationale for grouping the countries is based on dividing the EU27 into geographical zones (Northern, Central, Eastern Central, and Southern Europe). The three European Economic Area (EEA) countries belong to a group of their own. With this approach the aim is to ensure that among the countries selected for the case studies an even representation of North, East, West and South of Europe will be achieved in the study.

The expected scope of this case study review will be a **70-90 page summary** that will explore how guidance can most successfully be used for fostering active ageing and age management in the following contexts and settings as described below. This summary should be a synthesis of the case study findings. At the same time though **complete case study descriptions** (approx. 5 pages each) will have to be provided separately to Cedefop.

The two sets of **case studies of good practices** (a total of 24 descriptions) on cooperative arrangements between key actors (12) as well as on employers' age management strategies in organisations (12) should fulfil the following characteristics/ requirements:

- a) **Case studies of good practices on cooperative arrangements between key stakeholders** (12 case studies from selected European countries)

Not only employees and employers, but more than ever before also intermediary organisations (e.g. employers' associations, trade unions, chambers of commerce, and public bodies from local municipalities and regional authorities to national ministries and European institutions) are challenged by the growing demand for holistic policies that ideally support the creation of new employment and learning opportunities for older workers. Consequently, the issues of demographic change and ageing workforce have been addressed to a greater extent in European countries in the past few years by legislation, measures and programme activities.

Cooperative arrangements between social partners, public employment services, regional and local authorities, employers, adult learning providers and civil society actors are to be placed within the context of national employment and lifelong learning policies/strategies, in which guidance usually is an integral element and in which older workers/ageing workforce and related issues are normally addressed (such as skills development, quality of employment, career-related transitions, age discrimination and even occupational health). Moreover, such policy and strategy documents often also highlight the importance of cross-sectoral and cross-actoral cooperation and coordination mechanisms as to better accommodate the needs of the (ageing) labour force.

The main aim of these case studies (based on identifying good practices) on *cooperative arrangements between key stakeholders* is to look into how the different actors together provide/contribute to providing guidance support for older workers' participation in lifelong learning for skills development (in order to keep them longer in employment). While identifying and examining the good practices, the contractor shall specifically pay attention to the following aspects:

- **The nature of cooperative arrangements:**
 - is there a formally/explicitly agreed common agenda on joint national/regional action on active ageing/age management that links the key players (e.g. training institutions, trade unions, NGOs, universities, and other relevant actors) *or* is the cooperation rather informal, loosely connected and less explicitly defined as well as characterised by each actor having its own agenda?
 - what are the main objectives/goals that the cooperation aims at achieving as to promote the concept of age diversity and intergenerational solidarity as well as disseminating good practice in age management?
 - what kind of cooperative action has been taken to counteract negative images of older workers and to promote lifelong learning as well as the recruitment and retention of older workers?
 - to what degree the cooperative action is supporting individual employers in setting up and implementing their own age management strategies in the work places?
- **The role of guidance in the cooperative arrangements:**
 - how does guidance support for older workers' learning and career development feature in these cooperative arrangements?

- what types of information, advice and guidance services are currently provided by the key actors to older workers, through which channels are these services being offered (i.e. access to services) and to what extent can they be considered as being tailor-made to meeting the needs of an individual older worker?
- is the existing guidance service provision sufficient to meet the needs of the ageing workers? if not, what future plans are there to improve the guidance provision and how should the cooperative arrangements be modified/strengthened to this end?
- how are guidance practitioners, teachers, trainers and other experts working with older workers equipped professionally to deal with the specific learning and career needs of this age group and how are the key actors addressing this issue in their cooperative arrangements?

b) Case studies of good practices on employers' age management strategies (12 case studies from selected European countries)

National governments have a key role to play in creating an environment that is conducive to good practice in age management. In regard to supporting active ageing, longer working lives and the abolition of age barriers, governments may provide funding to initiatives, they can regulate the economy and society (including the labour market), as well as encourage employers to launch age management strategies. Moreover, governments can use their legislative power, for example, to reverse policies that are (too) favourable to early retirement. Ideally, all relevant governmental policies (in which ageing is a transversal element) should be combined into a consolidated national age management strategy that allows employers to create solid conditions in which age management in organisations/work places can succeed.

The main aim of these case studies (based on identifying good practices) on *employers' age management strategies* is to explore to what degree the existing age management strategies in organisations/work places actually create an environment, in which older workers can manage their learning, careers and ageing. Therefore, the contractor shall examine employers' age management strategies with a special focus on how internal and external guidance support is available to the older staff members in the organisations as to facilitate their participation in learning and skills development (and that way be supportive to staying longer in working life).

As to employers' age management strategies, good employer practices can be regarded as organisational structures, cultures and systems that set the benchmark standards of excellence for others in the sector to follow. So, while looking for good practices, the contractor shall specifically pay attention to the following aspects:

- **The scope and nature of employers' age management strategies:**

- which areas/issues linked to an ageing workforce are covered by the existing age management strategies (e.g. adult learning, skills upgrading, validation of non-formally/informally obtained competences, intergenerational learning, flexible work practice, etc.)?
- what are the concrete measures/activities launched within the organisation/work place while implementing the age management strategy (or does such a strategy only exist on paper) and is there evidence indicating that such measures have been effective?
- how have older workers been encouraged to take advantage of the learning and career development opportunities that age management strategies are offering to them (i.e. abolition of barriers as well as creation of supportive conditions)?
- how employers' age management strategies have contributed to developing age awareness within the organisation (among the management, Human Resources staff, middle managers, employees)?

- **The role of guidance in employers' age management strategies:**

- to what extent guidance support provided by in-house experts/colleagues and/or external guidance experts is available to older workers within the areas/issues addressed by employers' age management strategies (e.g. adult learning, skills upgrading, etc.)?
- in concrete terms, what kind of information, advice and guidance provision is available and through which channels (e.g. online, individually face-to-face or in a group) can it be accessed?
- how is guidance support integrated in job sharing, job rotation, job transition, on-the-job learning as well as in intergenerational learning in the workplace, and how widely workplace mentorship programmes are available (i.e. older workers acting as mentors for their younger colleagues and/or older workers being mentored by their older colleagues/peers/managers)?

The focus while exploring good practices on employers' age management strategies should be on medium-sized and large organisations in public, manufacturing and service sectors. The contractor shall in the tender to Cedefop propose the percentage division between medium-sized and large organisations in the sample (e.g. fifty-fifty) as well as make a justifiable proposal for the specific sectors to be looked at in the case studies. (N.B. in the EU, a business with a headcount of fewer than 250 is classified as medium-sized; a business with a headcount of fewer than 50 is classified as small, and a business with a headcount of fewer than 10 is considered micro-business. Large businesses employ more than 250 staff members.)

2.3.3. Conclusions, key policy messages and areas for research and development

Based on the findings of the literature review (2.3.1.) and the analysis of good practices (case studies; 2.3.2.), the contractor shall

- identify and justify 3-5 areas of guidance** (relating to supporting older workers' longer working lives) that require further improvement and more attention in the future. This may include, for example, proposing new in-depth research/urgent policy action/special guidance measures, etc.
- summarise** the key findings of the 24 case studies, including the success factors and key benefits as well as the major challenges and eventual shortcomings linked to developing these good practices. This summative analysis (approx. 2 pages) should be integrated in the conclusions chapter of the study as to raise awareness of the lessons learnt about the role of guidance in the areas of cooperative arrangements among key players to promote active ageing as well as in organisations designing and implementing age management strategies.
- include key messages for policy- and decision makers as well as for employers and guidance practitioners.** The messages addressed to *policy-makers* should include proposals/recommendations for developing lifelong guidance policies and strategies in relation to promoting active ageing as well as to supporting older people to pursue learning and career development (with the ultimate aim to stay longer in employment). The messages targeted at *employers* and the *guidance community* (i.e. *practitioners, experts*) should highlight critical success factors, barriers and challenges for effective guidance service delivery for older workers within active age management strategies embracing learning and career development opportunities for ageing staff members.

2.3.4. Support materials for the research work

The literature review (see 2.3.1.) should take the below mentioned references (as well as many of the footnotes listed in these tender specifications) into consideration, but it should not be limited to them.

Cedefop (2008), Career development at work - A review of career guidance to support people in employment, http://www.cedefop.europa.eu/EN/Files/5183_en.pdf

This report presents the findings from a research study that set out to review the range of career guidance provision that supports workforce development across the EU25 and to identify innovative or 'best practice' provision. The report includes 35 case studies and these provide accounts of practice by employers, trade unions and the public sector as well as other intermediary organisations, such as outplacement consultancies, professional associations and industry sector bodies.

Cedefop (2010), Socially responsible restructuring - Effective strategies for supporting redundant workers, http://www.cedefop.europa.eu/EN/Files/6107_en.pdf

The review of socially responsible restructuring and effective strategies for supporting redundant workers provides practical evidence of the contributions of career guidance to socially responsible restructuring. The review covers eleven countries, seven of these providing enterprise case studies (AT, DE, FI, LV, SE, SK, UK). It examines socially responsible restructuring practices by enterprises and, in particular, strategies to support vulnerable workers who may have particular difficulties in re-engaging with the labour market; these include career guidance and training.

Cedefop (2010), The right skills for silver workers - An empirical analysis, http://www.cedefop.europa.eu/EN/Files/5508_en.pdf

The report discusses the demographic decline and the mismatch between the demand and supply of skills which are two issues of particular concern for the European labour market. As people age they are less exposed to physical risk at work but they are also less exposed to new developments, running the risk that their skills may not keep up with demand. A close study of the ways in which ageing workers' skills fall behind workplace demands can suggest policies to overcome this problem.

Cedefop (2010), Working and ageing - Emerging theories and empirical perspectives, http://www.cedefop.europa.eu/EN/Files/3053_en.pdf

The publication addresses the factors that enable or hamper people to continue working at advanced age. It conveys two crucial messages. First, successful active ageing requires commitment and involvement from ageing workers themselves and employers, in a context that supports learning and recognises the specific needs of ageing workers. Second, sustainable labour-market participation at later age cannot be achieved without sound understanding of ageing, working and learning and the interconnections between these processes.

Cedefop (2011), Learning while working – Success stories on workplace learning in Europe, http://www.cedefop.europa.eu/EN/Files/3060_en.pdf

The report presents an overview of key trends in workplace learning and takes stock of previous research carried out by Cedefop and other European/international organisations. The focus is on companies that wish to improve their employees' skills for a specific job; employees have an interest in developing skills that can generally raise their career and employment prospects. The report explores to what extent these potentially conflicting goals can be balanced. Moreover, it discusses if workplaces can become learning places where workers of all levels are encouraged to improve their knowledge, skills and competence.

Eurofound (2008), European Working Conditions Survey: working conditions of an ageing workforce, <http://www.eurofound.europa.eu/pubdocs/2008/17/en/2/EF0817EN.pdf>

This analysis of the working conditions of older workers in 31 countries in Europe, based on data from the European Working Conditions Survey, was carried out in 2005. The findings show significant differences between younger and older workers, such as: older workers have less exposure to physical risks in the workplace, enjoy a higher level of autonomy and a lower level of work intensity, than younger workers. However, they are less likely to be involved in new organisational developments and in participating in training. Job quality and job satisfaction are key factors in the sustainability of work and in retaining older workers in the labour market. Discrimination by age increases as people get older, with older women citing the most significant levels of discrimination in the workplace.

European Commission (2006), Ageing and employment – Identification of good practice to increase job opportunities and maintain older workers in employment,
http://www.diversityatwork.net/NL/Docs/ageingreport_en.pdf

This study on ageing and employment provides examples of how companies are addressing the issue of managing an ageing workforce. The report, based on 41 company case studies in 11 EU Members States (including CZ, DE, FI, FR, HU, IT, LT, NL, PL, PT UK) gives an overview of national developments and makes recommendations for maintaining older workers in employment. The report emphasises the importance of protecting older workers from redundancy while in employment, through ongoing training, in the context of lifelong learning, aimed at keeping employees' skills and knowledge up to date. The involvement and support of top management, human resources and line managers were considered essential for the success of age management policies in companies.

European Social Dialogue Committee in Electricity (2008), Demographic Change in the Electricity Industry in Europe - Toolkit on promoting age diversity and age management strategies
<http://www.eurelectric.org/Demographic/PDF/2008DemographicChangeEN.pdf>

The project on demographic change in the electricity industry was focussing on the employment lifecycle, from recruitment through employment to retirement. This toolkit presents best practices from company case studies, which can be used by employees, trade unions and workers' and employers' representatives in the electricity industry to address issues arising from demographic change. The Toolkit / Best Practices guide is intended to be an easy to use, practical guide, which can be circulated widely. It will be useful for human resource and line managers and trade union officials working in the electricity sector, who have a responsibility for drawing up policies and procedures and monitoring progress in this area.

OECD (2006), Live Longer, Work Longer - A synthesis report
http://www.oecd.org/document/42/0,3746,en_2649_34747_36104426_1_1_1_1,00.html

This report makes an important contribution to establishing a new agenda of age-friendly employment policies and practices. It draws out the main lessons that have emerged from the 21 country reviews which have been published separately under the OECD's series on "Ageing and Employment Policies". In an era of rapid population ageing, many employment and social policies, practices and attitudes that discourage work at an older age have passed their sell-by date and need to be overhauled. They not only deny older workers choice about when and how to retire but are costly for business, the economy and society. To help meet these daunting challenges, work needs to be made a more attractive and rewarding proposition for older workers.

OECD (2010), OECD Employment Outlook 2010 - Moving beyond the Jobs Crisis
http://www.oecd.org/document/46/0,3746,en_2649_34747_40401454_1_1_1_1,00.html#summaries

Among other things, the OECD Employment Outlook 2010 provides an in-depth assessment on labour mobility in the OECD labour markets. It shows that workers and jobs are continuously reallocated from declining to growing firms and sectors in all countries, but the right package of labour market policies is needed to maximise the productivity payoff from this mobility while minimising the resulting insecurity for workers. The edition 2010 also suggests that encouraging the growth of high-quality part-time work can be an important strategy for governments concerned with promoting high employment in the context of ageing population, work-family life reconciliation and orderly school-to-work transitions.

2.4. Description of deliverables and timetable

The contractor is required to submit:

- **a draft inception report six (6) weeks after the date of signature of contract**

The report should fine-tune the methodology proposed in the tender, including a proposal of research tools (e.g. draft interview grids/questionnaires and alike) that will be applied to identifying, assessing and analysing good practices. The report should also include a draft outline for describing the good practice cases (i.e. a template) as well as an outline of the 35-40 page policy synthesis (i.e. literature interview) including main headings and key elements/dimensions to be considered.

Based on the feedback given by Cedefop experts on the draft inception report at the kick-off meeting (due 2 months after the date of signature of the contract), the contractor is expected to take the comments of Cedefop into account while completing the final inception report. The final inception report is to be handed to Cedefop two weeks after the kick-off meeting (i.e. more or less 10 weeks after the date of signature of the contract).

- **an interim report No 1, within four (4) months of the date of signature of the contract**

The report will include:

- a draft policy analysis (i.e. literature review) highlighting intermediary findings and giving an overview of the current state-of-play in Europe;
- a list of potential case studies (i.e. good practices) with a justification of choices made as well as a description of selection criteria applied;
- a minimum of at least 6 completed case studies (with a detailed description and analysis);
- a short description of the methodology, including the final version of the tools for data collection and analysis;
- a list of data sources used/consulted, including bibliographical data, reference persons and institutions;
- an update of the work plan and timetable for the remaining contractual period;
- information on any major challenges encountered, solutions found or proposed and potential impact on the work ahead.

- **an interim report No 2, within eight (8) months of the date of signature of the contract**

The report will include:

- a completed literature review outlining in a solid manner the EU as well as national policy/strategy developments and already giving clear implications for the conclusions and key messages (which are an integral element of the final report);
 - a minimum of at least 18 completed case studies (with a full description and detailed analysis; N.B. the 6 case studies finalised in the previous stage are included in the total of 18);
 - an updated list of data sources used/consulted, including bibliographical data, reference persons and institutions;
 - an update of the progress made especially in terms of challenges and difficulties encountered, and a work plan and timetable for the remaining contractual period as to ensure the good preparation of the final version of the study.
- **a draft final report (study), within 11 months of the date of signature of the contract and a final report within 13 months of the date of signature**, following the guidelines provided in these Technical Specifications and including:
 - an executive summary in English, presenting the main findings and highlighting key policy considerations for the future (to be drafted as a self-standing document);

- the 35-40 page policy synthesis (i.e. literature review) on the contributions of EU and national policies and strategies to active ageing will be illustrated with examples of effective policies and practices;
- a comprehensive report on study findings (70-90 pages) highlighting key elements/themes emerging from the individual case studies as well as showcasing briefly good practices across Europe (i.e. based on the separately compiled 24 thematic case studies);
- a full compilation of the required 24 case studies (good practices) that can serve as prominent examples for guidance service providers and policy-makers in Europe;
- annexes, such as a bibliography, research tools, and a full description of the methodology.

Cedefop will provide comments on the inception report, interim report/s and the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study (final report). The layout and format of the text of the reports – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual (see Annex H of the Tender Specifications).

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

The Contractor shall ensure that the (draft) final report as submitted to Cedefop has been subject to professional proof-reading, and editing in English, the cost of which must be included in the financial offer, point 2c) of Price Schedule Table in point 5.4. below.

2.5. Scheduled meetings

The contractor (1-2 persons) will be requested to attend **four (4) one-day meetings** in Cedefop's premises (Thessaloniki, Greece) with Cedefop expert/s responsible for lifelong guidance and ageing workers as follows:

- **a kick-off meeting** around 2 months after the date of the signature of the contract to fine-tune the research methodology to be applied, the data sources to be used and the final planning, as well as to discuss the draft inception report (which is due 6 weeks after the date of the signature of the contract);
- **the first interim meeting** around 4-5 months after the date of signature of the contract to discuss the draft policy analysis (i.e. literature review) as well as the proposed selection of case studies (i.e. good practices) and the first 6 completed case study descriptions;
- **the second interim meeting** around 8-9 months after the date of signature of the contract to discuss the completed literature review and related key messages/conclusions as well as the 18 completed case study descriptions. In addition, the Cedefop peer learning event/small-scale seminar to disseminate the results of the study in late autumn 2012 will be addressed; and
- **a concluding meeting** around 1 year after the date of the signature of the contract to discuss the draft final report and the key policy messages.

2.6. Reimbursement of travel expenses

All costs incurred (travel, accommodation, etc.) related to Cedefop's meetings (point 2.5. above) have to be included in the financial offer, **point 2a) of Price Schedule Table**

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the technical specifications (points 2.3 and 2.4), have also to be included in the financial offer, **point 2b) of Price Schedule Table**.

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

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 group (consortium) members (if any) and the subcontractor/s (if any), 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.

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

In case 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.

Requirement:

- The average annual turnover of the tenderer for the last **three (3)** financial years for which accounts have been closed **concerning the type of services covered in this call for tenders** should be at least **250,000 €**.

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

- Signed statement(s) of the tenderer's turnover concerning the type of services covered in this call for tenders during each of the last three financial years to prove that the tenderer's average turnover over that period meets the minimum required, which will be verified with the information provided in Annex G – Questionnaire 2;
- for tenderers who are natural persons / freelancers - a tax declaration and tax clearance statement for the last **three (3)** financial years is sufficient.

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 evidence 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 case of contract award the winning tenderer 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.

If, for some exceptional reason the tenderer 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

Requirements for Technical and professional capacity:

Tenderers must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the technical specifications.

In particular, **the tenderer** must comply with the following requirements:

A minimum of five (5) years of experience in Europe-wide analyses on lifelong learning, national labour markets and related employment policies/strategies, as well as lifelong guidance.

The Tenderer's team of researchers and experts including the team leader, who will be proposed to carry out the required tasks is expected to demonstrate academic expertise and professional experiences as follows:

The Team Leader must possess all the following requirements:

- A minimum of **five (5) years** of professional experience in managing **research projects** at European/international level;

- A minimum of **five (5) years** of professional experience in EU-wide comparative **research** in **two (2)** of the following areas (the total experience from the required fields should amount to 5 years):

- ✓ VET and lifelong learning
- ✓ national labour market policies and/or employment strategies
- ✓ careers guidance

- A minimum of **two (2) years** of professional experience in research in **two (2)** of the following themes (the total experience from the required fields should amount to 2 years):

- ✓ policies/strategies that support longer working lives of older workers (55+)
- ✓ age management strategies in organisations
- ✓ validation and recognition of non-formally/informally acquired skills (focus on older workers)

- Linguistic ability to communicate and draft to a high standard in English (Level C1⁴⁷ as determined in "Language levels of the Common European Framework of Reference (CEF)").

The **members of the research team jointly** must be able to demonstrate at least three (3) years of experience in each of the following fields (i.e. the set of proposed CVs of all the team members must cover all three fields and counting together the duration (in years/months) of each individual team member's research experience must amount to a total of 3 years in each field):

- ✓ EU level experience in comparative analysis of thematic issues relevant to the present study;
- ✓ evaluation, analysis and reporting of case studies (good practices) across Europe
- ✓ adult learning for improving the employability of an ageing workforce

⁴⁷ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

In addition all members of the proposed research team must possess the linguistic ability to communicate and draft in English **and as a whole** the team must demonstrate capability to communicate and draft to a **high** standard in English corresponding to level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”.

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 tenderer’s profile that should also provide information as to experience relevant to the field of the study;
- List of at least **5 contracts** performed and finalised in the past **five (5) years** similar to the scope, size and nature as those required in this call for tenders, describing the subjects, the amounts, the dates, the percentage performed by the tenderer, and the contracting authorities (Annex G – Questionnaire 3);
- Detailed CVs of the proposed team leader and of **all members** of the research team proposed to carry out the required tasks and subcontractors (if any), with a brief description of professional experience, in particular in relation to the above required criteria, and including language ability. *(Cedefop recommends the use of Europass CVs⁴⁸ but other CVs will also be accepted)*;
- List of research publications released and/or scientific articles published (during 2007-2011) which the research team has been involved in and that are linked to the present study topic.

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 form (Questionnaire 1) 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).

⁴⁸ <http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

4 Additional information concerning participation to this tender

Participation in 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 in any non-EU country which has an agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

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 may be 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.

The tenderer must clearly indicate:

- the identity of those subcontractors only undertaking between 10% and 40% of the work by value,
- the identity of each and every subcontractor if the total subcontracting is above 40% of the work by value, independently of his contribution to the work by value.

For each subcontractor, identified as per any of the above two bullet-points, the tenderer should submit with the offer:

- the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective subcontractor;
- the required documents to show the economic/financial and technical/professional capacity of the subcontractor as described in points 3.2.1 and 3.2.2;
- 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), 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:

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

Whereby:

TQV = Total Quality Value of the tender, obtained as per point 5.1;

TFO = Total Financial Offer of the tender (as per point 5.4);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to **(65)**;

Y is the weighting for price (TFO) and for this tender procedure it is fixed to **(35)**.

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) criterion and a minimum of **65** out of 100 points (TQV) in the technical evaluation – see below).

5.1 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 tenders will be evaluated according to the following Award Criteria and points scored for each criterion:

Award criterion 1 – The level of understanding of the nature and the scope of the assignment, its context and results to be achieved (40 points)

- Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake, in particular, EU and national policy frameworks, developments and challenges relating to developing and implementing guidance measures that encourage older workers' participation in learning and career development opportunities as well as support their longer working lives and active labour market participation (20 points);
- Relevance of the proposal to the objective of the contract, level of understanding of the nature and the scope of the research work, its context and results to be achieved (20 points).

Award criterion 2 – Adequacy and relevance of the methodological approach to carry out the work (35 points)

- Appropriateness of the methodological approach as well as purposeful application of the methods proposed to conduct the analysis (envisaged steps, research methods and tools, primary and secondary data sources to be used, assessment of probable difficulties) in accordance with the requirements outlined in these Technical Specifications (25 points).
- Rationale and criteria for selecting the 12 countries for the case studies in accordance with the requirements outlined in these Technical Specifications (10 points).

Award criterion 3 – Appropriateness of organisation and management of the work (25 points)

- Organisation and coordination of the research work, division of tasks, type and degree of involvement of the proposed research team members (15 points);
- Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (10 points).

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) criterion** of the technical evaluation 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 (see point 5.4 below).

5.2 Technical proposal

All tenderers are advised to organise their technical offer in headings (and sub-headings) *or* to structure it in such way that the content of the technical offer meets the requirements defined in the Terms of Reference as closely as possible and facilitates the subsequent evaluation of tenders against the technical award criteria.

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

NB: All the information and evidence provided to Cedefop commit the tenderer (and respectively the contractor) throughout the duration of the contract.

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide:

For award criterion 1:

- A discussion paper (minimum 10 and maximum 15 pages; brief in form but comprehensive in scope) of the subject showing in-depth understanding of the concepts and research issues to be addressed in the study;
- A thorough description of the rationale and the conceptual approach underlying the study, with specific research issues, questions and hypotheses.

For award criterion 2:

- A comprehensive description of the methodological approach proposed as well as of the assessment of the major research challenges (conceptual, methodological) including an outline of each research stage within this approach; this should consist of terminology, concepts and methodology for data collection and analysis; a proposal and justification of potential data sources at European and national levels; identification of key stakeholders to be contacted throughout the research; a description of methods for quality assurance;
- A thorough definition of the criteria to be applied to selecting the countries from which case studies will be collected as well as a description of the rationale underlying/justifying the selection process.

For award criterion 3:

- A thorough, consistent and feasible work plan outlining key development stages and milestones, timetable, expected outputs and deliverables, including a preliminary assessment of probable difficulties in carrying out the work, and proposed measures to fulfil all the work plan related obligations;
- A description of the work organisation and management, i.e. the team to be assigned to the project, the distribution of tasks among the team members as well as communication policy within the research team.

The tenderer shall identify a Project Manager within his/her organisation who will be the one and only contact point for all administrative and operational communication in regards to the contract implementation. Cedefop will also designate the Contact Person in charge of handling the contact with the tenderer to whom this study contract will be awarded.

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 sub-contracting is above 40% of the work by value) as requested in point 4.2.

5.3 Financial evaluation

Only tenders scoring **65** points or more (of a maximum of 100 points) against the technical award criteria and **50%** or more of the possible score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered in the Price schedule table (see point 5.4).

5.4 Financial proposal

The financial offer must be clear and in compliance with the tender specifications. The Financial Proposal should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderer must fill out the following Price schedule table and present a detailed breakdown of the price offered. The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5). All services that shall be procured should be included.

Price schedule table

1)	Names / positions of the Experts*)	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending 4 one-day meetings at Cedefop (point 2.5 and 2.6 – 1 st paragraph)	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
				.
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks (point 2.6. – 2 nd paragraph)	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommod. etc
	2c) Other administrative expenses including professional proof-reading and editing in English of final report (see point 2.4. – last paragraph)	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+ 2b+2c)				
3)	Total Price = Subtotal 1 + Subtotal 2			

*) **Distinguish between:** Expert/senior researcher - Junior researcher - Secretary/assistant - External expert (if applicable). The estimated total number of working days must be justified by the methodology and work organisation.

Information concerning price

- The prices quoted must be fixed and are 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 written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see point 2.6 – last paragraph and Annex III of the draft contract in Annex B).
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, 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 (this applies only to tenderers established in Greece): ... EUR.

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 – 3 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 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 5.4.

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 file in *.doc)

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.

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& Annex C	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1-3 (Annex G)	3.2, 3.3, 4.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, & Annex I (model 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2 & Annex J	☐	☐	
- Legal Entity Form	3.3 & 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	5.2	☐	☐	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4	☐	☐	

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 1 – 3

(Given as separate files in *.doc)

ANNEX H

CEDEFOP STYLE MANUAL

(Given as separate file in *.pdf)

ANNEX I

POWER OF ATTORNEY - MODELS 1 & 2

(Given as separate files in *.doc)

ANNEX J

MODEL OF LETTER OF INTENT FOR SUBCONTRACTOR/S

(Given as separate file in *.doc)