



CEDEFOP

European Centre for the Development
of Vocational Training

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 10/05/2012
RS/PRO/DELE/2012/0248**OPEN INVITATION TO TENDER****AO/ECVL/LZAH-ILEMO/EvaluatingECVET/005/12****‘Methodologies for evaluating ECVET implementation’****Ref.: Contract notice 2012/S 88-143622 of 08/05/2012**

Dear Sir/Madam,

We thank you for the interest you have shown in this tender.

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tender Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders 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. Paraskevaidis
PO Box 22 427
GR – 55102 Thessaloniki, Greece**

Important:

Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu) or fax (+30 2310 490028)

✓ *that they have submitted an offer in time, and*

✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*

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. Paraskevaidis
123, Europe Str, GR-57001 Thessaloniki-Pylea
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/LZAH-ILEMO/EvaluatingECVET/005/12 ‘Methodologies for evaluating ECVET implementation’ 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:

7.1 Contacts before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the tender documents. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

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

- Cedefop may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tenders.

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

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

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

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	11/06/2012	< N/A >
Last date on which clarifications are issued by Cedefop	< as soon as possible >	< N/A >
Deadline for submission of tenders (hand delivered)	19/06/2012	< 17h00>
Deadline for submission of tenders by post / courier	19/06/2012	< N/A >
Validity of the tenders	19/12/2012	< N/A >
Tender opening session	03/07/2012	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 should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of 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 G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/LZAH-ILEMO/EvaluatingECVET/005/12

‘Methodologies for evaluating ECVET¹ implementation’

Tender Specifications

¹ European Credit system for VET

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Introduction to Cedefop

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

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

Cedefop, (the European Centre for the Development of Vocational Training) [founded in 1975](#) and based in Greece since 1995, is a European Union (EU) agency. It provides the European Commission, Member States ⁽²⁾ and social partners with insights into trends concerning VET and offers advice on how European VET policy should meet the challenges Europe and its citizens face.

The evidence Cedefop provides comes from its:

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

CEDEFOP'S OBJECTIVE AND PRIORITIES FOR 2012-14

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

- **Supporting modernisation of VET systems**

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

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

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

⁽²⁾ Cedefop also works with Iceland and Norway.

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

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

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

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

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

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

CEDEFOP'S INFORMATION

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

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

1 Overview of this tender

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

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

1.1 Description and type of the contract

a) Title of the contract:

‘Methodologies for evaluating ECVET implementation’

b) Short description of content of this contract:

The purpose of the study is to elaborate a methodological framework for the evaluation of ECVET implementation in Europe. This includes an assessment of the feasibility and the reliability of the framework through its pilot testing in three European Member States. Additionally the study will support Cedefop's systematic annual monitoring and analysis of progress made by European countries (EU Member States, Norway and Liechtenstein) in implementing ECVET.

c) Type of contract: Service contract (Study contract related to research)

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 tender specifications. Cedefop will disregard any variants described in a tender, and further reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5 Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **150.000 EUR, excluding VAT**.

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party (i.e. Cedefop) and shall have duration of **twelve (12) months**.

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

Improving lifelong learning has been at the heart of many European and national education and training policies. The “Council conclusions on a strategic framework for European cooperation in education and training”⁽³⁾ for the period up to 2020, emphasise the need to establish in Europe a context spanning education and training systems as a whole in a lifelong learning perspective. A central role of this process is the development of common European instruments, aimed at overcoming the diversity of national education and training systems by enhancing transparency of competences and qualifications, and facilitating mobility of learners and workers.

European cooperation in education and training has stimulated dialogue among a wide range of stakeholders, including governments, social partners, institutions, learners and VET providers from public and private sectors. It has also improved links between different parts of national education and training systems focusing on how systems of other countries relate to each other; and how education and training can be more relevant to labour market needs.

2.2 Background and context of the study

During the last decade a number of European tools and principles have been launched as a part of the Education and Training 2010/2020 and Copenhagen processes to meet the needs for lifelong learning and increased mobility of learners and workers. The European Qualifications Framework (EQF) and the related National Qualifications Frameworks (NQFs), Europass, the European Credit system for VET (ECVET), the European Quality Assurance Reference Framework for VET (EQAVET) and the European principles and guidelines on validation of non-formal and informal learning have all been designed to make qualifications easier to understand. These tools and principles constitute an integrated framework, the impact of which depends on their consistency and how they interact. Their implementation will increase transparency of qualifications, support mobility and benefit citizens by providing a systematic and transparent way to present, validate and document their knowledge, skills and competence.

The European tools and principles have been developed at different speeds over the period 2004-09⁽⁴⁾ and address the needs of individuals and of policy-makers operating between the education and training system and the labour market. For all of them, the objectives, guidelines, and timetables are agreed at European level, with implementation driven by Member States.

2.3 ECVET implementation process

ECVET is the European instrument to promote mobility in vocational education and training, bringing a common language, and stimulating exchanges and mutual trust among VET providers and competent institutions across Europe.

³ http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf

⁴ http://www.cedefop.europa.eu/EN/Files/9065_en.pdf

In the context of international mobility but also mobility within countries, ECVET helps validate, recognise and accumulate work-related skills and knowledge acquired during a stay in another country or in different situations, so that these experiences contribute to vocational qualifications. This will improve transparency within Member States, in a borderless lifelong learning area. Additionally ECVET will also contribute to the development and expansion of European cooperation in education and training.

The development of ECVET began in 2002 after the Copenhagen Process emphasised the need for a credit system for VET. The system has been developed by the Member States and the social partners in cooperation with the European Commission and has been adopted through a Recommendation by the European Parliament and the Council in 2009⁵. The implementation of ECVET in the ET 2010/2020 participating countries is voluntary.

The timetable for ECVET implementation, as foreseen in the ECVET recommendation, includes: (a) a preparatory period running until 2012, during which the Member States are asked to create the necessary conditions and to adopt measures with a view to introducing ECVET. During that period, each Member State may adopt and introduce ECVET (and also carry out tests and experiments, for which support may be provided under the lifelong education and training programme) without waiting until 2012; (b) a period for the gradual introduction of ECVET, running until 2014 with a possible revision of the European Recommendation in 2014.

ECVET governance⁶ supports cooperation and peer learning on ECVET developments. The different actors of the ECVET governance are:

- (a) The European Commission with the support of Cedefop and ETF;
- (b) The European ECVET users group⁷ which is the main body in charge of the political follow-up of ECVET at European level. It consists of representatives of the Member States, the European/national social partners and other stakeholders as well as Cedefop and the European Training Foundation (ETF). It is steered by the ECVET steering group;
- (c) A European ECVET network⁸. This is a large open forum gathering competent institutions, social partners, sectors and VET providers. Its main activities include dissemination and exchange of information and experience;
- (d) The ECVET team, contracted by the European Commission, supports the ECVET network. It organises the meetings of the ECVET network, provides coordination and advice, supplies and disseminates information concerning ECVET and the network; it designs and carries out peer learning activities for the ECVET users and interested parties.

⁵ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:155:0011:0018:EN:PDF>

⁶ http://www.cedefop.europa.eu/EN/Files/6114_en.pdf

⁷ <http://www.ecvet-team.eu/en/content/promoteurs-nationaux-0>

⁸ <http://www.ecvet-team.eu/en/content/european-ecvet-network>

The Bruges Communiqué ⁽⁹⁾ in its strategic objective “Making lifelong learning a reality” for the period 2011-2020 urges the European Commission together with Cedefop to provide the technical support and guidance regarding ECVET implementation and calls participating countries to systematically use and promote European transparency tools. Cedefop directly supports the EU political and institutional process by providing policy advice and expertise to the European ECVET governance and also produces annual monitoring reports presenting the challenges linked to the development of ECVET and how it is taken on board at national, regional and project levels.

As Cedefop’s latest ECVET monitoring ⁽¹⁰⁾ shows, most countries have started working on ECVET. For example, Belgium (Wallonia), Germany, Austria and Finland have developed national initiatives which illustrate the diversity of approaches. These countries are considering ECVET either for enabling learning and aiding mobility or for supporting permeability within VET; they are carrying out feasibility or impact studies and, as in Belgium (Wallonia), the development of ECVET is nurtured by the developments and results of European ECVET projects. Two further elements are worth noticing in these examples: the involvement of a large range of stakeholders and the regional dimension as support for mobility.

Currently, the Member States and the Commission support a Europe-wide ECVET testing to which all stakeholders have been invited to participate. Preparing for ECVET encompasses activities ranging from legal and regulatory updates to broad range test initiatives. The 2009 ECVET recommendation gives a key role to projects and project partnerships to test and experiment the technical features of ECVET in the context of learner's mobility and support national projects to test and develop the credit system. The European Commission issued two calls for proposals in 2008 and 2010 to finance European projects under the lifelong learning action programme. A group of 19 projects have been running under a common monitoring and their activities have been evaluated recently¹¹. Meanwhile more than 260 projects have been analysing the ECVET features (learning outcomes approach, design of units of learning outcomes, memorandum of understanding and learning agreements), elaborating and sharing solutions. Another network supporting the ECVET implementation process in the Member States through a bottom-up approach is the thematic NetECVET¹², which consists of 14 national agencies of the Lifelong Learning Programme (LLP) coordinated by the German national agency.

⁹ http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bruges_en.pdf

¹⁰ <http://www.cedefop.europa.eu/EN/publications/19523.aspx>

¹¹ http://www.ecvet-projects.eu/Documents/Seminars/ECVET_Brochure_singlepages_allthesame.pdf

¹² <http://netecvet.com/about-us/>

2.4 Description of tasks and methodology

Against this background, the purpose of this study is twofold:

- to elaborate a methodological framework for the evaluation of ECVET implementation and its impact on national and regional education and training systems in Europe; this includes assessing the feasibility and reliability of the framework by testing it in three European countries; and
- to support Cedefop's systematic work in monitoring and analysing ECVET progress in Europe (EU Member States, Norway and Liechtenstein).

The study should follow a comparative approach. It should be based both on existing research and policy documents as well as on collecting new data. This work will support Cedefop's work on ECVET and will also provide valuable input to the European Commission's 2014 evaluation of ECVET implementation in Europe.

In the following sections, the tasks and methodology are described in detail.

2.4.1 Tasks and methodology

The contractor should carry out three main tasks:

a) Develop a methodological framework for the evaluation of ECVET implementation

The study should propose a methodological framework suitable for the analysis of ECVET implementation in Europe taking into account challenges related to the ECVET specificities and countries differences. This framework should take into account and include:

- a) the technical features required for the ECVET implementation such as: the use of learning outcomes, defining units, transfer arrangements, quality criteria, agreements for mobility and recognition, etc. and
- b) the political features required for the ECVET implementation such as: policy learning mechanisms, how different policies issues of equity, labour market, employability, legislative arrangements are addressed etc.

The tenderer should propose alternative methodological approaches for the evaluation of ECVET implementation and analyse their pros and cons, the feasibility and reliability. Moreover, the tenderer should also indicate which of the methodological frameworks would be recommended and the reasons why. Proposals for indicators suitable for the evaluation of the implementation process, data collection instruments (interview grids, checklists, expert groups, etc.), description of the surveyed population, should also be produced.

The analysis of different types of methodological frameworks for the evaluation of ECVET implementation should be based on literature reviews and research as well as on qualitative research methods (i.e. interviews with experts from different sub-systems of education and training should be conducted and any other means proposed by the contractor). For the desk research the successful tenderer will review the most recent policy and research publications/papers and identify relevant data in countries. Cedefop's monitoring reports on ECVET implementation and the LdV projects experiences should be taken into consideration.

b) Pilot testing

The development of the methodological framework will be followed by its testing in 3 national case studies, which will analyse in depth how the methodological framework can be applied for the evaluation of ECVET implementation in the countries selected. These case studies should be carried out on the basis of study visits with interviews, surveys and other means proposed by the potential contractor.

The selection of the countries by the tenderer should address different factors, such as state of ECVET developments, geographical coverage, small-large countries, older-newer member states. The final decision on the selected national case studies to be examined will be made in the inception meeting with the agreement of Cedefop's project managers responsible for this project. In each national case study the successful tenderer should interview at least 10-15 policy makers, experts, social partners and other relevant stakeholders.

The methodological framework and the results of the testing phase will be discussed and validated at **a workshop organised by Cedefop**. The contractor should comment and make proposals during the preparatory phase of this workshop, should participate actively (3-5 experts from the contractor team – expenses covered by the contractor) and should compile a synthesis report on the outcomes. The 1,5 day workshop will be organised in Thessaloniki during month 8 of the study and will involve in total approximately 35 experts.

c) Support Cedefop's 2013 ECVET monitoring

The third task of the study is to support Cedefop's regular (annual) monitoring and analysis of the progress of ECVET implementation in EU Member States, Norway and Liechtenstein. In each country, the contractor should conduct interviews with two stakeholders (that will be agreed with Cedefop's project managers responsible for this project) and provide detailed English transcripts of them.

For this task the contractor should use Cedefop's interview grids and will be invited to comment on them together with the elements for discussion in the interviews during the inception meeting with Cedefop's project managers responsible for this project.

The tenderer is advised to assemble the team necessary to execute, manage and coordinate the study. Considering its complexity, the tenderer is advised to rely on a team of experts capable to carry out all different tasks. During the whole duration of the study the contractor will be working in close collaboration with Cedefop's project managers responsible for this project.

2.5 Deliverables and timetable

The study will have four deliverables:

- **An inception report**
- **A first interim report (methodological framework)**
- **A second interim report (national case studies, preparation of the workshop, interviews for ECVET monitoring) and**
- **A final report**

The first interim report should be made available within 4 months of the date of signature of the contract (time restriction linked to the deadline for the first European ECVET evaluation in June 2014).

- **The inception report should be delivered 4 weeks after the date of signature of the contract.** It should be based upon the tendering offer and the discussion with Cedefop's project managers during the inception meeting. It should include a description of how the contractor intends to elaborate and assess the alternative methodological approaches as well as updated work plan and timetable. The report should also include the final decision on the selected national case studies as agreed with Cedefop's project managers. This inception report should also include comments/ proposals for the organisation of Cedefop's workshop. Additionally an updated work plan and timetable should be presented.
- **The first interim report should be delivered within 4 months of the date of signature of the contract**, following the guidelines provided in these Technical Specifications and including:
 - An executive summary highlighting the main findings regarding the methodological framework for the evaluation of ECVET implementation, which can also be distributed as a self-standing document;
 - A detailed presentation of the methodological framework for the evaluation of ECVET implementation in Europe identifying key challenges and solutions found or proposed;
 - Conclusions.
- **The second interim report will be delivered within 6 months of the date of signature of the contract** and will comprise:
 - An analysis with intermediary findings regarding the 3 national case studies, which will test in depth the methodological framework;
 - Information on any major challenges/ obstacles encountered, solutions found or proposed and potential impact on the methodological framework and in view of the preparation of the final version of the study;
 - The intermediary findings of the stakeholders' interviews (2 from each EU Member State, Norway and Liechtenstein) supported with remarks/ comments/ proposals regarding Cedefop's annual ECVET monitoring;
 - The work carried out and the data sources that have been used;
 - Elaborated proposals for the Cedefop's **workshop to be organised one month after the second interim report** for the assessment/ analysis of the methodological framework developed and applied in the national case studies;
 - Proposed structure of the final report.

- **The draft final report should be delivered within 9 months and the final report, within 11 months of the date of signature of the contract,** following the guidelines provided in these Technical Specifications and including:
 - An executive summary highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document;
 - Full results of the findings regarding the 3 national case studies, which will test in depth how the methodological framework works and how it can be used for the evaluation of ECVET implementation. This could include a chapter on review of the methodological framework;
 - A synthesis report of the workshop results;
 - The full transcripts in English of the stakeholders' interviews (2 from each EU Member State, Norway and Liechtenstein) supported with remarks/ comments/ proposals regarding the support to Cedefop's 2013 annual monitoring;
 - The work carried out and the data sources that have been used including bibliographical data, reference people and institutions;
 - Conclusions;
 - Annexes, such as a bibliography, list of abbreviations, research tools, and a full description of the methodology.

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

The Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English; the related costs must have been included in the tenderer's financial offer.

2.6 Meeting and travel expenses

2.6.1 Meetings

The contractor (up to 2 persons) will be requested to attend in total **four one day meetings. All meetings will be held at Cedefop, in Thessaloniki.**

1. A kick-off meeting 2 weeks after the contract is signed. The meeting will agree on the work to be followed on the development of the methodological framework and the selection of national case studies.
2. A meeting on the 5th month of the study following the first interim report (development of the methodological framework). The national case studies and the interview grids that will be used for the interviews of the ECVET monitoring will be agreed in this meeting.
3. A meeting on the 7th month of the study following the second interim report to discuss the organisation of Cedefop's workshop following the national case studies and to agree on the structure of the final report.
4. A meeting on the 10th month of the study to discuss and provide comments on the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study.

2.6.2 Workshop organised by Cedefop

In addition to the above meetings the contractor (3 to 5 team experts) will be requested to participate to the workshop organised by Cedefop as described in point 2.4.1 (b) – Pilot Testing.

All costs incurred, including travel & accommodation related to Cedefop's meetings in Thessaloniki and in the workshop organised by Cedefop (described in point 2.6.1 and 2.6.2 above) have to be included in the Financial offer (see point 5.4, item 2a in Price Schedule table).

2.6.3 Other costs

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the Technical Specifications have also to be included in the Financial offer (see point 5.4, item 2b in Price Schedule table).

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

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

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

3.2 Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed 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 **concerning the type of services covered in this call for tenders** should be at least **150,000 €**.

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

- Signed statement (please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover concerning the type of services covered in this call for tenders during each of the last 3 (three) financial years.

In the case of a consortium (grouping) or subcontracting each member of the consortium and all subcontractors (in line with points 4.1 or 4.2 below) must provide the required statement for the economic and financial capacity (Questionnaire 2 of Annex G), **but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.**

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

If, for some exceptional reason the 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

The Tenderers are required to have sufficient technical and professional capacity to perform the contract. They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements:

- **The tenderer must have a minimum of three (3) years** experience in the field of policy analysis and capacity to access data at national and European levels;
- The Tenderer's proposed team of experts must have the relevant to the subject of the contract profiles, knowledge and experience for the successful implementation of the contract. In particular, the below requirements are mandatory:

For the proposed Team Leader:

- ✓ **Minimum five (5) years** individual experience in international research project management in **one or more** of the following fields:
 - policy analysis,
 - methodologies for evaluating education and training policies,
 - credit arrangements and qualifications systems and frameworks.

The total experience from the above fields should amount to at least five years.

- Linguistic ability to communicate and draft to a **high standard in English** (Level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)").

For each of the proposed Researchers/team members who will be involved in the study:

- ✓ **Minimum three (3) years** individual experience in **one or more** of the following fields:
 - policy analysis,
 - methodologies for evaluating education and training policies,
 - credit arrangements and qualifications systems and frameworks.

The total experience from the above fields should amount to at least three years for each researcher proposed.

- ✓ Each member 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 company profile with short presentation of the Tenderer (experience in the field of policy analysis and capacity to access data at national and European levels);
- List of at least **3 contracts** performed in the past **three (3)** years (to have been concluded by the deadline of submission of offers) similar to the scope, size and nature of this call for tenders, describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (please fill-in Annex G – Questionnaire 3);
- **The detailed CVs of all experts** who will be proposed to implement the contract (the Team Leader/ Senior researcher and the team of Researchers, i.e. of all the persons whose involvement will be crucial for performing the contract), including reference to linguistic abilities.

In the 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).

4 Additional information concerning participation to this tender

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

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

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

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

Only in cases when:

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

the tenderer should submit with the offer:

1. the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective Subcontractor;
2. the required documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2;
3. the Form in Annex J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective Subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract.

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

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

5 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender that offers the best-value-for-money as represented by the highest Total Score (TS) out of 100.

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

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

Whereby:

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

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

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

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

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each award (evaluation) criterion and in total 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 study contract as described in the Tender Specifications.

The following Award Criteria for the technical evaluation will be applied to this tender procedure:

- ***Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (40 points)***
 - ✓ The level of understanding of the conceptual, practical and technical issues related to the development of methodological frameworks for the evaluation of education and training policies with a focus on ECVET developments **(20 points)**;
 - ✓ The overview and understanding of how the methodological framework that will be developed for the evaluation of ECVET implementation in Europe can be validated in national case studies taking into account differentiations between countries **(10 points)**;
 - ✓ The level of understanding of issues related to the support of Cedefop's ECVET monitoring **(10 points)**
- ***Award criterion 2 – The quality and relevance of the methodological approach to carry out the work (40 points)***
 - ✓ Proposal for carrying out the tasks in terms of the selection of methodology(ies) and the data sources to be used so as to meet the requirements outlined in the technical specifications **(25 points)**;
 - ✓ Rationale for the selection of 3 countries (based on state of ECVET developments, geographical coverage, small-large countries, older-newer member states) for an in depth use of the methodological framework **(15 points)**

- ***Award criterion 3 – Appropriateness of organisation and management of the work (20 points)***
 - ✓ Allocation of tasks, type and degree of involvement of the proposed experts **(10 points)**;
 - ✓ Project organisation and mechanisms to guarantee successful and on-time delivery of tasks with adequate quality and risk management **(10 points)**.

5.2 Technical proposal

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference in point 2 above providing a practical, detailed description of the goods or services proposed for performance of the contract.

Tenderers are requested to organise the technical proposal in headings or to structure it in such a way as to ensure that the content of the technical proposal meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria. It is up to the tenderer to present in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full to) all requirements outlined in the Terms of Reference.

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

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

For award criterion 1

- A concise discussion demonstrating in-depth understanding of the conceptual, practical and technical issues regarding the development of methodological frameworks that can be used for the evaluation of ECVET implementation in Europe (maximum 15 pages);
- A concise discussion demonstrating in-depth knowledge and understanding of how a methodological framework can be applied for the pilot testing of evaluation of ECVET implementation taking into account differentiations between countries (maximum 5 pages);
- A concise discussion demonstrating in-depth knowledge and understanding of how Cedefop's monitoring exercise can be supported through interviews, preparation of transcripts and organisation of a reflection (maximum 5 pages)

For award criterion 2

- A detailed description of the approach to be followed to carry out the work in terms of the selection of methodology(ies) and the data sources to be used so as to meet the requirements outlined in the technical specifications (maximum 10 pages);
- An substantiated explanation for selecting the countries that will be considered in development of the methodological framework of the study (maximum 5 pages);

For award criterion 3

- A description of the work organisation and management, i.e. the team to be assigned to the project and the distribution of tasks among them;
- A detailed timetable with descriptions of the deliverables, and different stages of work, including an analysis of the difficulties likely to be encountered in carrying out the work and an indication of how the tenderer intends to address these difficulties.

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

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

5.3 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 maximum 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).

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

Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) 30.*

Where 30 = price weighting (see the complete formula under point 5 above)

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 take account of the estimate of value (see point 1.5). All services that shall be procured should be included.

Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop's meetings and workshop as per points 2.6.1 and 2.6.2 of the Terms of Reference have to be included in the financial offer, point 2a) of the "**Price Schedule Table**" below. Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in point 2.6.3, 1st paragraph have also to be included in the financial offer, point 2b) of the Table.

Any extra travel, accommodation etc expenses besides those mentioned above, that might be needed to perform the tasks related to the contract (point 2.6.3, 2nd paragraph), 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).

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 premises in Thessaloniki including the participation to the workshop in Thessaloniki (points 2.6.1 & 2.6.2)	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 2.6.3 1 st paragraph)	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommodation, etc.
	2c) Other administrative expenses including professional proof-reading and editing in English of final report (see point 2.5 – 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			

The VAT amount must be indicated separately here (this applies to tenderers established in Greece only): ... EUR.

*) **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.

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

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

Information concerning price

- The prices quoted must be fixed and are not revisable.
- Prices must be quoted in euro and include all expenses.
- 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.

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 (if any) as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal 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)