


CEDEFOP

 European Centre for the Development
of Vocational Training

FINANCE AND PROCUREMENT

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Thessaloniki, 18 April 2013

OPEN INVITATION TO TENDER

AO/ECVL/JB-SPEV/LearningOutcomes/004/13

“The application of learning outcomes approaches across Europe - a comparative overview”

REFERENCE: Ref.: Contract notice – 2013/S 074-122730 of 16/04/2013

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/JB-SPEV/LearningOutcomes/004/13

**“The application of learning outcomes approaches across Europe –
a comparative overview”**

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 tenders.
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 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)	20/05/2013	N/A
Last date on which clarifications are issued by Cedefop	As soon as possible	N/A
Deadline for submission of tenders (hand delivered)	28/05/2013	17.00h
Deadline for submission of tenders by post / courier	28/05/2013	N/A
Validity of the tenders	28/11/2013	N/A
Tender opening session	11/06/2013	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,

G. Paraskevaïdis

Head of Finance and Procurement
 Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/JB-SPEV/LearningOutcomes/004/13

**‘The application of learning outcomes approaches
across Europe - a comparative overview’**

Tender Specifications

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INTRODUCTION TO CEDEFOP: EUROPE’S AGENCY FOR TRAINING POLICY

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

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

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

The evidence Cedefop provides comes from its:

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

Cedefop’s objective and priorities for 2012-14

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

- **Supporting modernisation of VET systems**

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

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

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

⁽¹⁾ Cedefop also works with Iceland and Norway.

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

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

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

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

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

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States.

Cedefop is also finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

Cedefop's information

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

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

1. OVERVIEW OF THIS TENDER PROCEDURE

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

Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a Technical and Financial 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:*

'The application of learning outcomes approaches across Europe - a comparative overview'

b) Short description of content of this contract:

The study will map and analyse how learning outcomes approaches are influencing European education and training policies and practises. The study will cover the 33 countries taking part in the E&T 2020 process and aims in particular to gather evidence on developments in the last five years and the impact of these on lifelong and life-wide learning. The study seeks to better understand how the application of learning outcomes differs between countries and subsystems of education and training (i.e. higher education, VET, general education, adult education). While an important objective of the study is to provide overview over policy developments, 10 case studies in five selected countries will allow for more detailed in-depth analysis and empirical research on how learning outcomes approaches are interpreted and applied by institutions providing initial education of teachers and (a selection of) students enrolled in these programmes.

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

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 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 **250,000 Euro (without VAT)**.

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have duration of **18 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. Three payments are foreseen: 30% pre-financing, 30% interim payment and 40% payment of the balance.

2. TERMS OF REFERENCE

2.1. Introduction

This study is concerned with the shift to learning outcomes currently taking place in education and training systems across Europe ⁽²⁾. The study - departing from the agreed understanding of learning outcomes as ‘statements on what a learner knows, is able to do and understands following completion of learning’ ⁽³⁾ – will address the following two key questions:

- To what extent and how is the shift to learning outcomes influencing education and training policies at national level?
- To what extent and how is the political priority given to learning outcomes influencing the institutions and practices of teaching and training professionals?

An important purpose of the study is thus to gain better understanding of the interaction between top-down interventions made at national (and European) level and the bottom-up developments pursued at the level of education and training institutions providing initial education of teachers.

The study will apply a comparative and explorative approach and should document and analyse whether and how countries and sub-systems of education and training differ in their implementation of the learning outcomes approach – politically as well as practically.

2.2 General purpose of the study

The study aims to map and analyse the shift to learning outcomes in education and training policies and practices in European countries taking part in E&T 2020 programme.⁽⁴⁾ It will build on previous work in this area, notably the Cedefop’s study on the shift to learning outcomes in Europe. Since this study was published in 2009, the political support to and technical work on developing and implementing learning outcomes has further increased.⁽⁵⁾

⁽²⁾Cedefop. 2009: The shift to learning outcomes: policies and practices in Europe http://www.cedefop.europa.eu/EN/Files/3054_en.pdf

Cedefop. 2009: The dynamics of qualifications: defining and renewing occupational and educational standards

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=556

Cedefop. 2009: The relationship between quality assurance and VET certification in EU Member States

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=555

Cedefop. 2010: Learning outcomes approaches in VET curricula <http://www.cedefop.europa.eu/EN/publications/16433.aspx>

Cedefop.2010: Linking credit systems and qualifications frameworks <http://www.cedefop.europa.eu/EN/publications/15974.aspx>

Cedefop. 2010: Changing qualifications, http://www.cedefop.europa.eu/EN/Files/3059_en.pdf

Cedefop.2012: Curriculum reform in Europe: the impact of learning outcomes, <http://www.cedefop.europa.eu/EN/publications/20816.aspx>

Cedefop.2009.2010.2011.2012. Development of national qualifications frameworks, <http://www.cedefop.europa.eu/EN/publications>

⁽³⁾Recommendation of the European Parliament and the Council on the European Qualifications Framework for lifelong learning (EQF), 2008/C 111/01 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

⁽⁴⁾ The 33 countries to be covered by the study are as follows: 27 EU Member States; Norway, Lichtenstein, Switzerland; Croatia, Iceland and Turkey.

⁽⁵⁾ Consult Cedefop's studies mentioned in the footnote 2.

The most recent Cedefop's analysis of NQF developments in Europe ⁽⁶⁾ shows that the shift to learning outcomes is widely accepted as a pre-requisite for modernising education and training systems and practices.

2.2.1 The main findings of Cedefop's 2009 study on learning outcomes

The 2009 study covered 32 countries and reported on the role played by learning outcomes in general, vocational as well as higher education. The report concluded that while the shift to learning outcomes was well under-way in vocational as well as in higher education, this was to a lesser extent the case for general and in particular upper-secondary general education. The report noticed that while learning outcomes were increasingly being used to define and design qualification levels, qualification standards as well as courses, programmes and curricula, the impact on assessment and teaching and training practices was less pronounced. The study underlined the complex conceptual, technical and practical nature of the shift to learning outcomes. Notably, learning outcomes are required to perform multiple functions in national education and training systems. The challenges involved in using learning outcomes for qualifications frameworks are different from those encountered when writing curricula, carrying out assessments and when informing the teaching and training process. The need for learning outcomes to be fit for purpose and sensitive to the context they are used in is therefore essential.

2.2.2 Developments since 2007-2008 and their possible implications

Various Cedefop studies and evidence show that learning outcomes approaches and perspectives are being strengthened in European education and training systems and practices. A major change since the previous study is the rapid development and implementation of learning outcome-based national qualifications frameworks ⁽⁷⁾. The big majority of countries have now finalised the design of their frameworks and are gradually moving into an early operational stage where explicit learning outcomes based levels are being used as a reference point for the full range of national qualifications. The processes leading up to these frameworks have generally been inclusive and involved a broader group of stakeholders in a concrete discussion on how to describe and apply learning outcomes. In some countries this has been accompanied by redefinition and rewriting of standards and curricula ⁽⁸⁾, targeting parts of the education and training system where learning outcomes have not been used previously. This seems in particular to be the case for higher education where systematic efforts to promote the shift to learning outcomes can be observed in countries like France, Norway and Poland. While these developments are considered as positive, there is less evidence as regards the 'deeper' impact of learning outcomes, notably on assessment forms and teaching and training practices. We can furthermore observe uncertainty as regards the consistency of the approach. Both researchers and practitioners point to inconsistent descriptions and interpretations of learning outcomes.

⁽⁶⁾ Cedefop. 2013. Analysis and overview of NQF developments in European countries (November 2012).

http://www.cedefop.europa.eu/EN/Files/6117_en.pdf

⁽⁷⁾ Cedefop. 2009,2010, 2012.2013. Development of national qualifications frameworks.

⁽⁸⁾ Cedefop.2012: Curriculum reform in Europe: the impact of learning outcomes,

<http://www.cedefop.europa.eu/EN/publications/20816.aspx>

Lack of consistency and mutual understanding, reflecting lack of systematic critical dialogue across educational subsystems, on a longer term basis can reduce rather than increase transparency and improve comparability.

It is finally asserted in the research literature ⁽⁹⁾ that uncritical use of the learning outcomes approach can reduce the scope of learning rather than open up towards the vision of ‘active learning’ which is frequently associated with the shift to learning outcomes.

2.2.3 The current study

The study to be carried out under the present invitation to tender aims to cover the 33 countries⁽¹⁰⁾ taking part in the E&T 2020 programme and provide an updated picture of developments in this area since the last study was published. In accordance with the two key questions already raised, the study should be operationalized in the following way.

First, evidence should be collected on the development of national policies on learning outcomes. This part of the study aims to describe the objectives of these interventions, the form they take and their focus and coverage. We need to understand whether policies in this area are comprehensive or whether they are limited to particular areas, for example sub-systems of educations and training (general, vocational (school-based, work-based), higher education, adult learning). Following from this it will be important to address to what extent initiatives seek to bridge the different subsystems and to what extent the challenge of lifelong learning is addressed. This part of the study should also address to which extent policies are accompanied by a concrete strategy for implementation, and how this is defined in terms of timelines and supported by resources.

Second, evidence should be collected on how the learning outcomes approach influence education and training practices. Given the complexity of this area, and the impossibility of covering all countries and subsystems, a set of in-depth case studies in selected countries should be carried out to illustrate relevant challenges. The role of teachers is generally considered as critical, and the case studies should focus on how the learning outcomes approach is applied by institutions designing and providing initial education and training for teachers as well as how this is perceived by those enrolled in these programmes. Pursuing research at these two levels allows for a systematic reflection on the relationship between policies and practices. Some researchers ⁽¹¹⁾ challenge the ability of ‘top-down’ policy interventions to trigger practical change at institutional and professional level. The study should reflect on this issue, but also consider to what extent practical, ‘bottom up’ experiences have influenced policies.

⁽⁹⁾ Hussey, T. and Smith, P. 2002. The trouble with learning outcomes, in *Active Learning in Higher Education* No 3, 220-233; Hussey, T. and Smith, P. 2008. Learning outcomes, A conceptual analysis, in *Teaching in Higher Education*, Vol. 13, No 1, 107-115; Allais, S. 2012. Claims vs practicalities: lessons about using learning outcomes, in *Journal of Education and Work*, 25:3, 331-354; Allais, S. 2011. Using learning outcomes to make educational judgments: some practical and conceptual issues, in: Bohlinger, S.; Münchhausen, G. (eds). *Validierung von Lernergebnisse [Recognition and validation of learning outcomes]*. Bonn: BIBB, pp. 145-167.

⁽¹⁰⁾ The 27 EU Member States, plus Norway, Lichtenstein, Switzerland, Croatia, Iceland, and Turkey

⁽¹¹⁾ Lassnigg, L. 2012. ‘Lost in translation’: learning outcomes and the governance of education, in *Journal of Education and Work*, 25:3, 299-330.

The use and impacts of learning outcomes approaches may to a large extent depend on how they are defined and formulated ⁽¹²⁾. These descriptions - narrow or broad, detailed or general - will inevitably influence policies as well as practices. The conceptual approaches chosen by countries must therefore be systematically addressed and analysed by the study.

The study aims to develop a robust analytical framework to collect evidence on how learning outcomes have been applied and promoted in different contexts in recent years and under which conditions political and practical success can be recorded.

2.3 Research questions

Learning outcomes as a catalyst for policy reforms

An explorative and comparative study, covering the 33 countries taking part in the E&T 2020 program, will research how the learning outcomes are reflected in national education and training policies. The following specific questions should be answered:

- a) To what extent is the learning outcomes approach influencing national education and training policies:
 - which objectives have been set;
 - what form do initiatives take;
 - what is the coverage of initiatives;
 - what is the level of implementation?
- b) To which extent is the learning outcomes approach influencing particular sub-systems of education and training (notably in VET, HE, general education, adult education)?
 - which objectives have been set;
 - what form do initiatives take;
 - what is the level of implementation?
- c) To what extent are the objectives of lifelong and life-wide learning being addressed by these policies?
- d) What are the main drivers behind these policies?
- e) What are (success) factors to support or to hinder the implementation of these policies?

While focussing on concrete policy initiatives (administrative, legal or otherwise) where the learning outcomes perspective is present, the study should also capture developmental work (in the form of projects and experimental activities) that may eventually point towards political reform at national, institutional and local level. **Learning outcomes as a catalyst for practical reform at the level of institutions and teaching/training professionals**

The study will investigate how institutions in charge of initial education and training of teachers respond to increased focus on learning outcomes.

The following specific issues should be given particular attention:

- a) How and to what extent do teacher initial education, its programmes, curricula and methodologies reflect the learning outcomes approach?

⁽¹²⁾ Souto-Otero, M. 2012. Learning outcomes: good, irrelevant, bad or none of the above? Journal of Education and Work, 25: 3 249-258; Cedefop.2012: Curriculum reform in Europe: the impact of learning outcomes, <http://www.cedefop.europa.eu/EN/publications/20816.aspx>

- b) How is the learning outcome perspective perceived by those enrolled in these programmes?

This part of the study is of critical importance as it will document and improve the evidence base on the extent to which the shift towards learning outcomes is triggering change at institutional level.⁽¹³⁾ It will study conditions and (success) factors of implementation of learning outcomes inspired policies in different contexts.

2.4 Description of tasks and methodology

The study should follow a comparative and qualitative approach. It should be based both on secondary data analyses, taking into account existing research at national, EU and international level and policy documents as well as on collecting and analysing new data. In the following sections, the tasks and methodology are described.

2.4.1 Tasks

The contractor should carry out the following tasks:

a) Comparative overview of 33 countries taking part in ET2020 programme

The study will map and analyse objectives, focus, coverage and concepts underpinning policy interventions based on learning outcomes approaches. To be carried out in 33 countries taking part in E&T2020, the study aims to gather evidence on progress made in last years (2009 onwards) and on how comprehensive and successful are these policies in addressing challenges of lifelong and life-wide learning. Conceptual approaches on learning outcomes applied in different countries and sub-systems (i.e. HE, VET, general education, adult education) will be systematically addressed and analysed.

b) In-depth analysis of case studies

The comparative country overview and analysis will be supported by in-depth case studies addressing how learning outcomes approaches are reflected and embedded in programmes, curricula and practical arrangements for initial education and training of teachers. Tenderers are invited to outline a proposal for **10 case studies in 5 selected countries** to be carried out on the basis of study visits and other proposed research methods. The case studies will allow for more detailed in-depth analysis and empirical research on how learning outcomes approaches are applied by institutions designing and providing initial education and training for teachers as well as how this is perceived by those enrolled in these programmes.

⁽¹³⁾ Taking into account also Cedefop's and other (international) studies.

c) Key messages and recommendations for policy-making and further research

The selected contractor should identify key policy messages, critical success factors, challenges and trends related to: (i) learning outcomes as catalysts for policy reforms (ii) learning outcomes as a catalyst for practical reform at the level of institutions and teaching professional as well as challenges of interactions between these two levels. Finally, the selected contractor is expected to identify and suggest future analytical research needs in this field. Throughout the execution of these tasks, the contractor has to consult closely with Cedefop's staff in charge of the project.

2.4.2 Methodology

a) Desk research

For the desk research, the tenderer will review most relevant research and policy documents and map developments in the **33 countries taking part in E&T2020 programme** in the two interrelated domains of the study: (i) learning outcomes as catalysts for policy reforms, (ii) learning outcomes as a catalyst for practical reform at the level of institutions and teaching professionals.

b) Interviews with national experts

The literature review should be complemented with interviews with at **least four policy-makers/ experts** covering different subsystems of education and training (i.e. VET, HE, general education, adult education) in each of 33 countries. The aim of these interviews is to capture the most up-to-date developments, insights and validate the collected data. The contractor is also requested to propose other means to complement the comparative qualitative analysis of the country overviews.

c) Definition of criteria for selection of in-depth case studies and countries

The contractor should define criteria for the selection of **10 case studies** carried out in **5 selected countries**. Case studies will address design and provision of programmes and curricula in initial education of teachers.

The criteria for the selection of case studies and countries have to be identified and clearly described in the Technical proposal. However, selection criteria will be discussed and agreed with Cedefop's project manager(s) in the inception report. In addition, the final decision on case studies and countries to be examined will be discussed and agreed with Cedefop's project manager(s) in the draft interim report.

d) Qualitative and quantitative analysis of case studies

The data collection for case studies will be based on research literature review; and review and analysis of programmes, curricula and practical arrangements in initial education of teachers. Other qualitative research methods (country visits, interviews, focus groups etc.) should be used to collect primary and in-depth data on how learning outcomes approaches are used and reflected in programmes/curricula and arrangements for initial education of teachers. Perceptions and views of those involved in designing and delivering initial education of teachers as well as of those enrolled in these programmes will be collected and analysed. Taking into account the methodological challenges involved, the contractor must pay particular attention to the proposal on how to best organise the research for the case studies.

e) Research tools

The selected contractor is expected to design research tools for the collection and analysis of primary and secondary data, in particular, for mapping developments in 33 countries taking part in E&T2020 programme and for analysing these developments in a comparative approach, as well as for carrying out the 10 case studies in 5 selected countries.

f) Networking with national experts

The contractor is advised to assemble the team necessary to execute, manage and coordinate the study. Considering the complexity of the study, the contractor is advised to rely on a team of experts/consortia across different countries to carry out the analysis and validate the findings and key policy messages.

2.5 Deliverables and Timetable

The following reports should be submitted:

An inception report, 6-8 weeks after the date of signature of the contract, which refines in agreement with Cedefop's project manager(s) the methodology proposed in the tender, including criteria for the selection of 10 case studies and 5 countries for in-depth study, a proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data, a detailed list of key stakeholders and institutions to be contacted, etc.), as well as an updated work plan and timetable.

A draft interim report, within 8 months and the **final interim within 9 months** of the date of signature of the contract, which will comprise:

- A complete overview on the developments of national policies on learning outcomes in the 33 countries under examination, objectives and form of these policy interventions and coverage;
- Identification of case studies and countries that have been selected for in-depth analysis and preliminary findings;
- A short description of the methodology, including the final version of the tools for data collection and analysis;
- A complete list of data sources, including bibliographical data, reference people and institutions;
- Information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- A proposed outline of the final report.

A draft final report, within 15 months of the date of signature of the contract, and **a final report within 16 months** of the date of signature, following the guidelines provided in these Technical Specifications and including:

- An executive summary, highlighting the main findings;
- A comparative analysis of developments of national policies on learning outcomes, their objectives, drivers, forms and coverage, illustrated with national examples that should be embedded in the text;
- An in-depth analysis of case studies;

- Key findings and policy messages for the different stakeholders at national and European level on developments of national policies on learning outcomes, their objectives, drivers, forms and coverage, trends, challenges and success factor for their implementation;
- 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). Cedefop reserves the right to ask for any background data, and evidence of computations and the quantitative models used in the analysis carried out by the contractor.

The selected Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (the Table in point 5.4, item 2c).

2.6 Meetings and travel expenses

2.6.1 The contractor (2 persons) will be required to attend the following one-day meetings with the responsible project manager/s at Cedefop’s premises in Thessaloniki, Greece:

- a) A kick-off meeting 3 to 4 weeks after the contract is signed to fine-tune the research methodology to be applied, the data sources to be used and the final planning, described in the inception report;
- b) A meeting to discuss the draft interim report and preliminary key messages of the study, monitor progress and agree on the case studies to carry out and the outline of the final report;
- c) A meeting to discuss and provide comments on the final outcomes and key policy messages included in the draft final report.

The Contractor will take these comments into account in the preparation of the final version of the study (final report).

In addition, the contractor (up to 2 persons) will be required to actively participate in a one and a half days conference in Thessaloniki on 21-22 November 2013.

All costs incurred, including travel & accommodation related to Cedefop’s meetings and the conference in Thessaloniki (described above) as well as any travel expenses that may occur in performing the tasks as described in point 2.3, have to be included in the Financial offer (see point 5.4, item 2a in Price Schedule table).

2.6.2 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).

2.6.3 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 PROCEDURE

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. Please note that natural persons (individuals, freelancers) are also considered 'entities' for this purpose.

3.2.1 Economic and Financial capacity

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

Requirements:

- The average annual turnover (invoiced financial value) of the tenderer for the last **three** financial years concerning educational, socio-economic research and policy analysis should be at least **500,000 €**.

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 for the last three financial years concerning educational, socio-economic research and policy analysis .

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

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss

Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors. For tenderers or subcontractors (identified as per any of the two bullet-points in the 4th paragraph of point 4.2 below) who are natural persons / freelancers, a tax declaration and tax clearance statement for the last three financial years will be requested.

If, for some exceptional reason the winning tenderer (or any consortium member or subcontractor) 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, experience, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements

- The tenderer must have adequate experience in the field of policy analysis and/or comparative research in education and training at European level, having performed **contracts** with a total minimum invoiced financial value of **250,000 Euro** during the last three (3) years.

- **The Tenderer's proposed team of researchers/experts** must have the relevant to the subject of the study profiles, knowledge and experience for the successful implementation of the contract. In particular, the below requirements are mandatory:

For the proposed Team Leader:

- Qualifications and skills: University degree in humanities, social or education sciences;
- **Minimum eight (8) years** individual experience in international research project management;
- **Minimum eight (8) years** individual professional experience in comparative research and/or policy analysis in the field of education and training systems and qualifications development;
- Languages: 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 the proposed Senior experts:

- Qualifications and skills: University degree in humanities, social or education sciences;
- **Minimum five (5) years** individual experience in comparative education and training research and/or policy analysis in the field of education and training systems, qualifications, and learning outcomes approaches;
- Languages: 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)"¹⁴).

¹⁴ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

For the proposed Junior experts :

- Qualifications and skills: University degree in humanities, social or education sciences;
- **Minimum three (3) years** individual experience in policy analysis and/or comparative research in the field of education and training
- Languages: Linguistic ability to communicate and draft **in English** (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 **presentation** of the Tenderer, demonstrating the required experience in policy analysis and/or comparative research in education and training at European level, with particular reference to learning outcomes approaches; List of **contracts performed** in the past three (3) years in the field of policy analysis and/or comparative research in the field of education and training at European level, describing the contracting authorities, the subjects, the dates, the amounts and the percentage performed by the tenderer (Questionnaire 3 in Annex G);
- The **Europass curriculum vitae** format (<http://europass.cedefop.europa.eu>) or similar format shall be filled in and signed, by each person involved in the execution of the tasks foreseen in the tender. CVs must clearly specify at the top the role of the expert in the team (Team Leader, Senior Experts, and Junior Experts). **Each CV must include a brief Annex** synthesising information aimed at demonstrating the professional capacity of the team member as above requested. In particular the Annex should clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, and main activities and responsibilities), and clearly present the linguistic abilities, in particular in English. The CV of the Team leader and Senior experts should also include a list of publications relevant to the subject of the call.

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 forms (tables) in Annex G.

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

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

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 119 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 sub-contracting 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 (as per points 5.1 and 5.2);

TFO = Total Financial Offer of the tender (as per points 5.3 and 5.4);

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 of the 3 award** (evaluation) criteria and in total a minimum of **70 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 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 (35 points)**
 - Conceptual approach for undertaking the study in accordance with the objectives and purpose of the tender **(20 points)**.
 - Demonstration of an in-depth understanding of current research, policies, developments and challenges at EU and national level related to the field of qualifications and learning outcomes **(15 points)**.
- **Award criterion 2 – The quality and relevance of the methodological approach to carry out the work (35 points)**
 - Relevance and soundness of the methodological approach proposed for carrying out the tasks in terms of terminology, methodology for data collection and analysis, envisaged steps, tools and data sources to be used to meet the requirements outlined in the technical specifications **(20 points)**.
 - Rationale and proposed criteria for the selection of case studies and countries **(15 points)**.
- **Award criterion 3 – Appropriateness of organisation and management of the work (30 points)**
 - Allocation of tasks, type and degree of involvement of the proposed human resources **(15 points)**.
 - Project organisation tasks (clarity, coherence and feasibility of the work programme and timetable) **(10 points)**.
 - Mechanisms to guarantee successful and on-time delivery with adequate quality management and risk assessment. **(5 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 / Technical Specifications in section 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 offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference or Technical Specifications 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.

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

For award criterion 1:

- policy context, rationale and conceptual/analytical approach to the study;
- discussion on key research issues and questions related to policies, developments and challenges related to the field of learning outcomes in the two related domains: i) learning outcomes as catalyst for policy reforms, ii) learning outcomes as catalysts for practical reforms at level of institutions;
- discussion on the relationships and challenges between policy and practical level.

For award criterion 2

- detailed description of the envisaged methodological approach and processes, including a list of steps, tools, potential data sources, classifications to be used etc.;
- rationale and proposed criteria for selection of case studies and countries.

For award criterion 3

- composition of the proposed team, the nature and the extent of the team members' expertise and participation in the study and allocation of tasks;
- detailed work plan illustrating intended organisation and management of the task including:
 - o timetable with descriptions of the deliverables
 - o arrangements for secure and easy communication with Cedefop;
- detailed quality assurance and preliminary assessment of likely difficulties in carrying out the tasks, back-up/replacement arrangements.

The tenderer shall identify a **Project Manager** within his organisation who will represent the **single contact point for all administrative and operational communication** in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Manager 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.

NB: All the information and means of proof provided commit the contractor throughout the duration of the contract.

5.3. Financial evaluation

Only tenders scoring **70 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 of the 3 award criteria** 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)* Y

Where Y = 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/ Technical specifications. The tenderers must fill-in the following Price schedule table and present a detailed breakdown of the price offered. The Financial Proposal should clearly match the Technical Proposal and take into account 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 three 1-day meetings and a 1.5-day conference at Thessaloniki (see point 2.6.1)	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 (see point 2.6.2)	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 (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2			

The VAT amount must be indicated separately here (this applies to tenderers established in Greece only): ... 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 – 4 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

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

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal containing all information requested in point 5.4.

ANNEX A

Contract Notice

(Given as separate file in *.pdf format)

ANNEX B

Draft Contract

(Given as separate file in *.pdf format)

ANNEX C

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

(Given as separate file in *.doc format)

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 (group leader in case of consortium, with indication of entity, 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 (group leader in case of consortium, with indication of entity, 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 1-4 (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/ 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 1-4

(Given as separate file in *.doc format)

ANNEX H

Cedefop Style Manual

(Given as separate pdf file)

ANNEX I

MODELS of POWER OF ATTORNEY

(Given as separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate file in *.doc format)