



CEDEFOP

European Centre for the Development
of Vocational Training

Area Resources - Finance and Procurement, Procurement Service

Thessaloniki, 20/04/2011
RS/PRO/DELE/2011/0225

OPEN INVITATION TO TENDER

AO/ECVL/ADEHM/ReturnToWork/004/11

‘Return to Work – Work-based learning and the reintegration of unemployed adults into the labour market’***Ref.: Contract notice - 2011/S 77-125415 of 20/04/2011***

Dear Sir/Madam,

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

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

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

(a) by post to be dispatched not later than **the date 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 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/ADEHM/ReturnToWork/004/11

***‘Return to Work – Work-based learning and the reintegration of unemployed adults
into the labour market’***

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.
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 specified in the timetable in point 8 below. No such requests will be processed after that date.

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

Any additional information, including that referred to above, will be published on Cedefop's website. Please ensure that you visit regularly the site for updates up to the closing date for receipt of tenders.

After the 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 either, because this would 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	24/05/2011	< N/A >
Last date on which clarifications are issued by the Contracting Authority	< as soon as possible >	< N/A >
Deadline for submission of tenders (hand delivered)	01/06/2011	17h00
Deadline for submission of tenders by post / courier	01/06/2011	< N/A >
Tender opening session	15/06/2011	11h00

9. Tenderers must maintain the validity of their tender for at least 6 months following the deadline of submission of tenders, i.e. **01/12/2011**.

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/ADEHM/ReturnToWork/004/11

***‘Return to Work – Work-based learning and the
reintegration of unemployed adults into the labour
market’***

Tender Specifications

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Introduction to Cedefop:

Strengthening European cooperation in vocational education and training policy

1) Founded in 1975 (1) and based in Greece since 1995, the European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union (EU) supporting European vocational education and training (VET) policy development. Its strategic objective for 2009-11 (2) is to 'contribute to excellence in VET and strengthen European cooperation in developing, implementing and evaluating European VET policy'.

2) This strategic objective is supported by four priorities, namely:

- (a) informing European VET policies;
- (b) interpreting European trends in and challenges for skills, competences and learning;
- (c) assessing VET's benefits;
- (d) raising the profile of VET.

3) Cedefop supports the European Commission, Member States (as well as the associated countries of Iceland and Norway) and social partners by:

- (a) using its expertise, gathered through research, analysis and networking, to identify trends and challenges and propose ideas for VET policies;
- (b) bringing together policy-makers, social partners, researchers and practitioners to share ideas and debate proposals on the best ways to tackle the challenges we face;
- (c) encouraging European approaches, principles and tools to improve training and achieve common aims;
- (d) raising awareness and understanding of how vocational education and training is evolving, and how it contributes to lifelong learning and other policies;
- (e) disseminating information through websites, publications, networks, study visits, conferences and seminars.

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

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

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

Informing European training policies

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

Interpreting European trends in skills and learning

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

Assessing the benefits of training

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

Raising the profile of vocational education and training

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

Cedefop's information

13) Cedefop's web portal www.cedefop.europa.eu includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.

14) Information about Cedefop's publications, many of which can be downloaded, can be found at <http://www.cedefop.europa.eu/EN/publications.aspx>. Cedefop's wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

15) Cedefop hosts and organises conferences and events throughout the year. Cedefop also manages several networks to exchange experience and debate, generate ideas and examine themes. These include Agora conferences, two or three are hosted in Thessaloniki each year. Study visits, short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning in another country. In working to improve VET, Cedefop cooperates with many organisations and has several networks to collect and disseminate information, exchange experience, stimulate debate and generate ideas. Cedefop's major networks include:

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

Management, resources and internal controls

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

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

1 Overview of this tender

In submitting his tender, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his/her own conditions of sale may be, which he hereby waives. Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a tender containing all the required information and documentation may lead to the rejection of the tender. No account can be taken of any reservation expressed in the tender as regards the tender dossier (if necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender); any reservation may result in the immediate rejection of the tender without further evaluation.

1.1 Description and type of the contract

a) Title of the contract: **‘Return to Work – Work based learning and the reintegration of unemployed adults into the labour market’**

b) Short description of content of this contract:

The purpose of this study is to investigate how work-based learning that focuses on the acquisition of key competences can contribute to getting low-skilled unemployed adults back into the labour market. The main objectives are:

- To analyse the existence and effectiveness of such work-based learning programmes, and the extent to which they are used in national unemployment policies;
- To analyse the actual and potential design of such programmes, taking particularly into account the key competences (to be) addressed, the specific target group and the concepts of work-based learning (to be) used;
- To identify future research needs and to provide some key messages for policy- and decision makers and for those who design and implement such programmes.

The study shall consist of a profound desk-research, a comparative overview of policies and practices in 15 EU member states and 10 in-depth case-studies.

c) Type of contract: Service Contract

1.2 Place of delivery or performance

The tasks must be completed outside Cedefop in the Contractor’s premises.

1.3 Division into lots

This tender procedure **is not** divided into lots.

1.4 Variants

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

1.5 Value or quantity of purchase

The estimated expenditure for the required services described in this call for tenders is of the order of **180,000 Euro**.

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party (estimated date July-August 2011), and shall have a duration of **14 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. Background of the study

2.1.1. Introduction: The need for action

The purpose of this study is to investigate in depth how work-based learning that fosters the acquisition of key competences can contribute to getting low-skilled unemployed adults back into the labour market.

This topic is of high importance. The European Union has agreed on the goal to achieve an employment rate of 75% for the 20-64 years age group by 2020. This objective is one of the five key elements of the Europe 2020 strategy for smart, sustainable and inclusive growth ⁽³⁾. A high employment rate is critical for Europe's recovery and for meeting the challenges Europe is facing through processes of transformation (e. g. demographic change). Achieving the target rate of 75% by 2020 is an ambitious commitment and no easy task. The crisis has brought the EU-27 employment rate (age group 20-64) down to 69% in 2009 ⁽⁴⁾. Eurostat estimates that a little more than 23 million men and women in the EU-27 were unemployed in October 2010 ⁽⁵⁾. Unemployment – especially long-term unemployment – is one of the main concerns of policymakers. Apart from its financial and social effects on personal life, unemployment negatively affects social cohesion and, ultimately, may hinder economic growth. To support the rise of the employment rate, it is particularly important to get certain target groups, especially women, the young, older and low-skilled people and migrants (back) into work ⁽⁶⁾.

In order to meet these challenges and to raise employment rates substantially, joint effort is needed. Within this context, the EU has taken systematic action on various levels. The European Employment Strategy provides for example a common framework for the Member States to take coordinated action to promote employment. It uses the new Employment Guidelines to call for increasing labour market participation ⁽⁷⁾. In the Europe 2020 framework, the European Commission has launched the Europe 2020 flagship initiative 'An Agenda for new skills and jobs: A European contribution towards full employment' ⁽⁸⁾. This flagship initiative proposes action across four main areas which emphasise that unemployment needs to be addressed from various angles, ranging from reforming the labour markets to skills development of the workforce. Within this context, vocational education and training (VET) plays a key role. As highlighted in the Bruges Communiqué, VET is crucial for equipping people with the right skills and contributing to their employability ⁽⁹⁾. The Bruges Communiqué calls for action in the field of VET and stresses the need to target disadvantaged groups such as low-skilled adults.

⁽³⁾ Europe 2020: A strategy for smart, sustainable and inclusive growth
http://ec.europa.eu/europe2020/index_en.htm

⁽⁴⁾ http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&plugin=1&language=en&pcode=t2020_10

⁽⁵⁾ http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Unemployment_statistics

⁽⁶⁾ Europe 2020: A strategy for smart, sustainable and inclusive growth
http://ec.europa.eu/europe2020/index_en.htm

⁽⁷⁾ Council of the European Union (2010): Council Decision on guidelines for the employment policies of the Member States <http://register.consilium.europa.eu/pdf/en/10/st14/st14338.en10.pdf>

⁽⁸⁾ European Commission (2010): An Agenda for new skills and jobs: A European contribution towards full employment (one of the seven EU flagship initiatives)

⁽⁹⁾ European Commission (2010): The Bruges Communiqué on enhanced European Cooperation in Vocational Education and Training for the period 2011-2020 http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bruges_en.pdf

2.1.2. Targeting low-skilled unemployed adults and their key competences

Low-skilled adults can be defined as adults who have only basic educational levels (ISCED 0-2) ⁽¹⁰⁾. This definition is based on internationally agreed standards and is widely used in cross-national surveys. Currently, almost 80 million of the EU-27 working population (25-64 year olds) are low-skilled ⁽¹¹⁾, and although this number is expected to decrease, it is of growing concern for policy-makers ⁽¹²⁾. The “Employment in Europe 2010” report reveals that – in terms of skill levels and relative falls in employment – the crisis has affected the low-skilled the most. Since the downturn in the EU labour market started in 2008, their employment has dropped by 10.2%, compared for example with a fall of only 2.7% for the medium-skilled ⁽¹³⁾. This shows the vulnerability of the low-skilled group and calls for action in the field of VET, as also exemplified in the Bruges Communiqué ⁽¹⁴⁾. Overall, this group has the lowest rate of employment, with only 45.1% (year 2010), compared to 68.7% for the medium-skilled and 82.8% for the high-skilled ⁽¹⁵⁾. Increasing the employment rate of the low-skilled is critical and needs to be a major concern in order to meet the benchmark rate of 75% by 2020.

Targeted measures are needed as this group is disadvantaged in finding jobs and getting (back) into employment. The Adult Education Survey reveals that – across all countries – the low-skilled are less likely to participate in formal and non-formal education and training and thus do less to upgrade or broaden their skills ⁽¹⁶⁾. Learning opportunities for low-skilled people remain limited ⁽¹⁷⁾. A considerable number of unemployed low-skilled adults lack key competences that are needed to find and stay in employment. The European Framework for Key Competences for Lifelong Learning identifies and defines eight key competences and emphasises that adults should be given opportunities to develop and update them throughout their life ⁽¹⁸⁾. Within this context, the crucial role of VET is frequently emphasised, for example in the Bruges Communiqué ⁽¹⁹⁾.

(10) ISCED-levels: 0 = pre-primary education; 1 = primary education or first stage primary education; 2 = lower secondary or secondary stage of basic education.

(11) Cedefop (2010): Skills supply and demand in Europe - Medium-term forecast up to 2020 http://www.cedefop.europa.eu/EN/Files/3052_en.pdf

(12) Cedefop (2010): Skills supply and demand in Europe - Medium-term forecast up to 2020 http://www.cedefop.europa.eu/EN/Files/3052_en.pdf

(13) European Commission (2010): Employment in Europe 2010 <http://ec.europa.eu/social/BlobServlet?docId=6288&langId=en>

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

(15) European Commission (2010): Employment in Europe 2010 <http://ec.europa.eu/social/BlobServlet?docId=6288&langId=en>

(16) Boateng, S. K. (2009): Significant country differences in adult learning - Eurostat Statistics in Focus 44/2009 http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-SF-09-044/EN/KS-SF-09-044-EN.PDF

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

(18) The eight key competences are: Communication in the mother tongue; Communication in foreign languages; Mathematical competence and basic competences in science and technology; Digital competence; Learning to learn; Social and civic competences; Sense of initiative and entrepreneurship; and Cultural awareness and expression. Recommendations of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning (2006/962/EC) <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:394:0010:0018:en:PDF>

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

VET is an important instrument for raising the overall employment rate among unemployed low-skilled adults. VET helps them to meet the rapidly-changing skill demands and to return into the labour market. There is a broad spectrum of approaches that can be used to foster their skills development. The spectrum ranges from purely school-based learning programmes within formal education and training systems to variants of work-based learning at the workplace.

2.1.3 Work-based learning

Work-based learning programmes can be defined as organised programmes that are wholly or predominantly based in a work setting, i.e. in an authentic, work-based context or in the workplace itself, and aim at developing knowledge, skills and competences that are – in a broad sense – relevant for the world of work.

In order to define work-based learning more precisely and to avoid confusion with similar concepts, it is useful to understand that there are various ways of combining work and learning, and various definitions of these approaches, amongst them most prominently workplace learning (often used as a synonym for on-the-job learning). Workplace learning encompasses both informal and non-formal learning embedded in the workplace. It can for example be fostered through job-rotation, coaching, task variety or challenging work tasks, but is not necessarily intentional or intentionally fostered, i.e. organised, as it might take place unintentionally while working. To distinguish between workplace learning and work-based learning, and to define work-based learning more clearly, for the purpose of the present study, work-based learning is conceived as learning which is aimed at intentionally, which is organised and which might be somehow broader in terms of its setting than workplace learning. It does not necessarily take place in one's workplace, but generally in work-based contexts. Participants do not need to be in employment; work-based learning can also be used for learning programmes that target unemployed people.

The scope of work-based programmes and their target groups differ. Some programmes aim for example at up-dating and developing very specific work-related skills that are needed for the use of new technologies and new production processes, while others aim at developing key competences such as writing and numeracy skills or fundamental working skills.

As outlined above, in addition to the lack of key competences, unemployed low-skilled adults often lack relevant or updated working experience. Therefore, the use of work-based “return to work” learning programmes that aim at the acquisition of key competences seems to be a promising approach to help unemployed low-skilled adults get (back) into work, as it helps them to develop their competences in work-based contexts and consequently to reintegrate into the world of work. There is, however, the need to explore such programmes and their benefits in more detail and to identify possible future lines of action. Therefore, Cedefop is launching this study on this topic.

2.2. General purpose

The overall purpose of this study is to investigate in depth how work-based learning that targets low-skilled unemployed adults and focuses on the development of key competences can contribute to getting this target group (back) into the labour market.

The study aims particularly to get findings on:

- The existence, spread and effectiveness of such work-based learning programmes in EU member states, and the extent to which they are used as part of national unemployment policies.
- The (actual and potential) design (both from a conceptual and a practical perspective) of such work-based learning programmes, taking particularly into account:

- the key competences that are (to be) addressed,
 - the target group low-skilled unemployed adults, their specifics as regards teaching and learning and respective consequences,
 - the concepts of work-based learning that are (to be) used.
- Future research needs as well as key messages for policy- and decision-makers and for those who are responsible for the concrete design and implementation of such programmes concerning the competences to be addressed, the design of work-based learning and the actual implementation.

The study builds on four interrelated tasks that serve the above-mentioned overall purpose:

- (1) a literature-based **desk research** that sets the context and basis of the study,
- (2) a **comparative overview** of 15 EU member states,
- (3) ten **case studies** of best practice examples and
- (4) **conclusions, key policy messages and areas for further research and development**. The four tasks with their particular objectives are described in detail below.

This study (contract) is embedded in the systematic research work undertaken by Cedefop in the respective fields (e.g. on key competences and their acquisition in the workplace / in work-based settings, and on adult learning developments and trends), and is part of Cedefop's Adult Learning activities.

2.3. Description of the tasks and the methodology

Together with his/her research team, the contractor should carry out the four main tasks which are outlined in detail below. Due to the complexity and multiplicity of the research topic, the study should follow a multi-disciplinary approach, taking into account the relevant fields of pedagogy, psychology, sociology and economics. Throughout the execution of these tasks, the contractor will be working in close collaboration with Cedefop's project managers responsible for this project.

2.3.1 Desk research

To set up the basis and the context of the study, the selected contractor shall undertake desk research (literature review, including research and policy documents) on:

- a) the concept of **key competences**, in particular the kind of key competences that low-skilled unemployed adults lack and hinder them to reintegrate into the world of work, i.e. to find and stay in employment; this implies that research on labour market needs has to be taken into account, too; the contractor should build on the extensive work that has been conducted by Cedefop in the fields of key competences and labour market needs;
- b) the target group **low-skilled unemployed adults**, their particularities as regards teaching and learning (e. g. learning needs) and subsequent consequences (e. g. for the design of programmes targeting this group);
- c) the **concept of work-based learning** (e. g. characteristics, models) and its potential (including evidence) to foster the development of key competences of low-skilled unemployed adults, aiming at successfully reintegrating them into the labour market;
- d) **other approaches** of getting low-skilled unemployed adults (back) into the labour market through the development of their competences; the development of **other competences** (e. g. specific work-related ones) and **other methods** (e. g. school-based learning) should be taken into consideration;
- e) the use of work-based learning programmes for low-skilled adults as an **instrument in unemployment policies**;
- f) **national and international studies** that have already been conducted in the field of the present study and on the results of these studies, incl. questions for further research.

2.3.2 Comparative overview (covering 15 EU Member States): Identification and analysis of national policy, policy initiatives and programmes that foster the reintegration of low-skilled unemployed adults into the labour market through the development of key competences in work-based learning

The selected contractor shall identify, analyse and report on **national policies and on policy initiatives and programmes** that foster the reintegration of low-skilled unemployed adults into the labour market through the development of key competences in work-based learning, covering 15 EU Member States. The criteria for selecting the 15 Member States shall be proposed and well justified by the contractor. The sample of countries to be covered is to be representative with regard to coverage of EU-member states (geographical spread, small/large countries, older/newer member states) and should also take other relevant aspects (e. g. unemployment rates, features of VET-systems, features of labour markets and labour market policies) into account.

The focus shall be on policy initiatives and programmes that have been **established and implemented with national/regional funding and/or with the financial support of the EU**, and which provide clear evidence of being effective in helping low-skilled unemployed adults to get (back) into the labour market.

Based on an analysis of 15 EU Member States, the contractor shall provide a **comparative overview on current practice and trends** related to respective policy initiatives and programmes. Aspects that shall be covered include for example:

- To what extent are work-based learning programmes for adults used as an instrument in national education/training and employment policies; to what extent are they used as part of unemployment policies?
- Do programmes that foster the reintegration of low-skilled unemployed adults into the labour market through the development of key competences in work-based learning exist?
- Which key competences are addressed?
- Is there a focus on particular sub-groups of low-skilled adults (e. g. migrants, older workers, long-term unemployed, women), on particular models of work-based learning, on particular sectors?
- Which other approaches of competence development are used to get unemployed low-skilled adults (back) into the world of work, both regarding the competences addressed and the methods used?
- To what extent do the work-based programmes for unemployed low-skilled adults focus on key competences (as, for example, contrasted to specific occupational tasks)?
- Regarding the aim of increasing the employment rate through education and training measures, how much emphasis is given to low-skilled adults (for example compared to high skilled adults)? What are the overall national strategies?

In order to provide an encompassing picture, relevant information on the **national contexts** (e. g. labour market characteristics such as unemployment rates, labour market demands and skills supply, labour market politics; overall percentage of low-skilled adults in the respective Member State; percentage of low-skilled adults participating in lifelong learning, VET-systems etc.) also needs to be taken into account. This information should be included in the comparative overview for explanatory purposes.

The methodology for identifying, analysing and presenting relevant policy initiatives and programmes and for mapping the developments in the 15 EU Member States shall be thoroughly selected, developed and justified by the contractor. The methods should include desk research (using data sources from national and European level; e. g. analysis of websites, research and policy documents) and consultation with key reference institutions and experts (e.g. from Public Employment Centres). It should be supplemented by other measures such as surveys, interviews or study visits. It is advisable that each country is covered by country experts to be selected by the contractor.

2.3.3 Case studies: In-depth analysis of ten examples of commendable practice

In-depth analyses of successful national initiatives and practices have the potential to bring about a considerable wealth of experience from which important lessons can be drawn. Therefore, tasks 2.3.1 and 2.3.2 above shall be completed by an in-depth analysis of ten examples of good practice. The contractor shall identify, analyse and report on ten best practice initiatives and/or programmes that have successfully proved to foster the reintegration of low-skilled unemployed adults into the labour market through the development of key competences in work-based learning. The examples of practice should be identified, analysed and presented based on a well-developed systematic approach. The contractor has to explain and justify the approach that is chosen.

The criteria for selecting the examples of commendable practice shall be proposed and well justified by the contractor, and the selection needs to be agreed by Cedefop. The perspectives of all key stakeholders – including the learners and those who are responsible for running the programmes and/or initiatives – shall be taken into account and shall be complemented by the perspectives of other relevant persons or institutions (e. g. employment centres).

The contractor shall provide a description of the existing practises as well as an analysis of the conceptual and practical basis on which the programmes and/or initiatives rest. The questions to be addressed should build on and complement the findings of tasks one and two (points 2.3.1 & 2.3.2). They shall include, for example:

- What are the key challenges involved in implementing and running the programme and/or initiative? How are they addressed?
- Evidence on the results achieved (short-, medium and long-term perspective)
- Which key competences are addressed?
- Which particular methods of work-based learning are used?
- Which stakeholders have been involved in the design and in the implementation?
- What are the institutional settings?
- Are the programmes and/or initiatives linked to formal qualifications or the validation of learning?

The work on the case studies shall be based on thorough secondary data collection (through desk research; review of literature, websites etc. on European and national/regional level) and on primary data collection (qualitative and/or quantitative research methods; e.g. country visits, interviews; observations, surveys). Similar to task 2.3.2 relevant context information with regards to the single case studies needs to be provided in order to get not an isolated, but an encompassing picture.

2.3.4 Conclusions, key policy messages and areas for further research and development

Based on the findings of tasks 2.3.1 to 2.3.3, the selected contractor shall draw conclusions and make recommendations.

- a) The contractor shall provide **conclusions** concerning the **existence** (spread) and **effectiveness** of work-based learning programmes that aim at the reintegration of low-skilled unemployed adults into the labour market through the development of key competences. To what extent are they used as an instrument in national unemployment policies?
- b) The contractor shall identify **success factors, challenges and trends** related to the reintegration of low-skilled unemployed adults into the labour market through the development of key competences in work-based learning. Amongst others, they shall cover: (i) the **key competences** that are (to be) addressed in order to get low-skilled unemployed adults (back) into work, (ii) the **design of work-based learning** for the target group low-skilled unemployed adults and the aim of developing key competences for their reintegration into the labour market; and (iii) the actual **implementation** of such work-based learning programmes.

- c) Building on a) and b), the contractor shall present **separate key messages** for (i) **policy- and decision-makers** and for (ii) **those** who are **responsible for the concrete design and implementation** of the programmes.
- d) The contractor shall identify and suggest **future research needs** in this field and **areas of further development**.

2.4. Description of deliverables - Reports

The Contractor is required to submit:

An ***inception report***, **six weeks** after the date of signature of the contract, which refines the methodology proposed in the tender, including a proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data...). The inception report will be submitted in electronic format.

An ***interim report***, **within six months of the date of signature of the contract** (to be submitted in electronic format), which will include:

- An analysis with intermediary findings, illustrated with some interesting examples of policies and practices;
- a short description of the methodology, including the final version of the tools for data collection and analysis;
- a list of data sources, including bibliographical data, reference people and institutions;
- a short description of the work carried out;
- an updated work plan and timetable;
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- a proposal for the structure of the final report.

A ***draft final report*** **within 10 months of the date of signature of the contract** and a ***final report (research report)*** **within 12 months of the date of signature**, following the guidelines provided in these technical specifications and including:

- an executive summary, highlighting the main findings and flagging up some key policy and research considerations for the future, which can also be distributed as a self-standing document;
- full results of the descriptive and analytical parts as described in these technical specifications;
- conclusions and recommendations as described in these technical specifications;
- annexes, such as a bibliography, a list of abbreviations, research tools, and a full description of the methodology;
- and, an in-depth analysis and presentation of the case studies, as described in these technical specifications. The case studies should be conceived as a self-standing document, but good examples of practice should also be embedded in the full report for purposes of explanation and illustration. The case studies in the self-standing document should be presented following a systematic approach.

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

The Contractor shall ensure that the (draft) final report as submitted to Cedefop has been subject to professional proof-reading and editing in English, the cost of which must be included in the financial offer (point a) of table 1 in point 5.4 below.

2.5 Meetings

The contractor will be requested to attend **three one-day** meetings at Cedefop in Thessaloniki with the project managers responsible for the study:

- a **kick-off meeting** after receipt of the inception report to fine-tune the research methodology to be applied, the data sources to be used and the final planning, as well as to discuss the inception report;
- an **interim meeting** to discuss the draft interim report, monitor progress and discuss the interim findings and preliminary key messages of the study;
- and a **final meeting** to discuss the final outcomes and key policy messages included in the interim and final reports, and to agree on the final version of the study.

2.6 Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop’s meetings have to be included in the financial offer, **point c) - sub-total (3) of Table 1.**

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, **point b) – sub total (2) of Table 1.**

Any extra travel, accommodation etc expenses besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop’s prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract in Annex B).

3 Specific information concerning participation to this tender

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all group (consortium) members (if any) and the subcontractor/s (if any), identified as per the two bullet-points in the fourth paragraph of point 4.2 below) shall provide the self-declaration found in Annex C duly signed and dated.

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

In case of recommendation for contract award point l) of Annex C will apply.

3.2 Selection criteria

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

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

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

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

3.2.1 Economic and Financial capacity

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

Requirement:

- The average **annual** turnover of the tenderer (of a single company, or of a consortium as a whole, if any) for the last three financial years **concerning the type of services covered in this call for tenders** should be at least **180,000 €**.

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

- statement(s) of overall turnover of the tenderer (single company, or statements for each consortium member, in case of a consortium) concerning the type of services covered in this call for tenders during each of the last three financial years, to prove that the tenderer's average turnover over that period meets the minimum required, which will be verified with the information provided in Annex G – Questionnaire 2;
- for consortium members or subcontractors who are natural persons / freelancers - a tax declaration for the last three financial years is sufficient.

In case of contract award the winning tenderer will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation.

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

3.2.2 Technical and professional capacity

Requirements for Technical and professional capacity:

Tenderers must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the technical specifications. In particular, the tenderer must comply with the following requirements:

- **Five (5) years** of tenderer's experience in Europe-wide analyses on VET, similar to the scope, size and nature of the services provided as those required in this call for tenders;
- The Tenderer's team of experts, who will be proposed to carry out the required tasks, must have relevant qualifications, professional profiles, knowledge, expertise and experience for the successful implementation of the tasks described in section 2 of these technical specifications.

In particular:

The Team Leader must possess all the following requirements:

- A minimum of **five (5) years** of professional experience in research project management;
- A minimum of **five (5) years** of professional experience in research in the field of vocational education and training (VET);
- A minimum of **three (3) years** of professional experience in comparative analysis in thematic issues that are relevant to the present study, in particular through transversal and comparative analysis across EU countries;
- A minimum of **two (2) years** of professional experience in research on case studies;
- A minimum of **one (1) year** of professional experience in research **in one** of the following fields:
 - ✓ policies that support the reintegration of unemployed into the world of work
 - ✓ teaching and learning of adults
 - ✓ key competences
- Linguistic ability to communicate and draft to a high standard in English (Level C1²⁰ as determined in "Language levels of the Common European Framework of Reference (CEF)").

The members of the research team must possess three (3) years of individual experience in at least one of the following fields:

- comparative analysis at European level in thematic issues that are relevant to the present study;
- vocational education and training;
- research on case studies.

However, the set of proposed CVs must cover all three fields.

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

²⁰ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

Proofs / Evidences of Technical and professional capacity

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

- Brief tenderer's profile that should also provide information as to experience relevant to the field of the study;
- List of at least **3 contracts** performed in the past **five (5) years** similar to the scope, size and nature as those required in this call for tenders, describing the subjects, the amounts, the dates; the percentage performed by the tenderer, and the contracting authorities (Annex G);
- Detailed CVs of the proposed team leader and of **all members** of the research team proposed to carry out the required tasks and subcontractors (if any), with a brief description of professional experience, in particular in relation to the above required criteria, and including language ability. (*Cedefop encourages the use of Europass CVs²¹ but other CVs will also be accepted*);
- List of own research publications of the research team related to the present study subject.

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

3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form. Tenderers are also requested to complete the respective form (tables) in Annex G – Questionnaire 1.

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).

²¹ <http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

4 Additional information concerning participation to this tender

Participation in tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 106 of the general Financial Regulation the participation is also open to all natural and legal persons in any non-EU country which has an agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

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

4.1 Joint Offers/ Groupings (Consortia)

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

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

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

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

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

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

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

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

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

4.2 Subcontracting/Subcontractors

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

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault.

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

The tenderer must clearly indicate:

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

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

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

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

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

5 Award of the contract

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

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

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

Total Score (TS) = X*(TQV/100) + Y*(Cheapest TFO / TFO)
--

Whereby:

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

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

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to (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 a minimum of 65/100 points (TQV) in the technical evaluation – see below).

5.1 Technical evaluation

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the tender specifications.

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

Award criterion 1: Level of understanding of the nature of the assignment, its context and the results to be achieved; relevance of the proposal to the objectives of the contract (total 40 points)

- Demonstration of in-depth knowledge and understanding of the concepts and research issues related to the study **(20 points)**.
- Relevance of the proposal to the objective of the study, level of understanding of the nature of the work, its context and results to be achieved **(20 points)**.

Award criterion 2: Appropriateness and quality of the methodological approach to carry out the study (total 40 points)

- Appropriateness and quality of the methodological approach suggested for carrying out the analysis (overall concept, envisaged steps, research methods and tools, data sources to be used) in accordance with the requirements outlined in the Technical Specifications **(30 points)**.
- Rationales and criteria for choosing the countries for the comparative overview and for selecting the case studies in accordance with the requirements outlined in these Technical Specifications **(10 points)**.

Award criterion 3: Project organisation and management of the work (total 20 points)

- Project organisation and mechanisms to guarantee successful and on-time delivery of tasks with adequate quality and risk assessment (clarity, coherence and feasibility of the work plan) **(10 points)**.
- Allocation and coordination of human resources in relation to the type of activities to be carried out, explanation of the role and extent of the team members' participation in the study **(10 points)**.

In order to guarantee a minimum threshold of quality, offers that do not reach a **minimum of 50% of the possible score for each award (evaluation) criterion** of the technical evaluation will be eliminated from further evaluation. Tenders scoring as a total **less than 65 (of a maximum of 100) points against the award (technical) criteria**, will not be considered acceptable and will therefore not have their financial proposal evaluated. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (see point 5.4 below).

5.2 Technical proposal

Tenderers are requested to organise the technical offer in headings or to structure it in such way as to ensure that the content of the technical offer 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.

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

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

For award criterion 1:

- A concise discussion paper (maximum 10 pages) of the subject demonstrating in-depth understanding of the concepts and research issues to be addressed in the study;
- A detailed description of the rationale and the conceptual approach underlying the study, with detailed research issues, questions and hypotheses.

For award criterion 2:

- A detailed description of the specific approaches, methods and sources proposed, including their rationale and assessment of the research challenges (conceptual and methodological), including:
 - a complete description and justification of the overall methodological design and of each research stage in this overall design in terms of terminology, concepts and methodology for data collection and analysis; a presentation and justification of potential data sources (e.g. surveys, interviews) at European and national levels and of potential key stakeholders to be contacted in any of the research stages; a description of methods for quality assurance and for the validation of policy recommendations.
- Explanation of the rationale and of the criteria for the choice of the EU member states for the comparative overview and for selecting the case studies.

For award criterion 3:

- a detailed, consistent and feasible work plan indicating key development stages and milestones, timetable, expected outputs and deliverables (e.g. development of research tools, reporting), including a preliminary assessment of likely difficulties in carrying out the work, and proposed actions to meet these;
- 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.

The tenderer shall identify a Project Manager within his/her organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. Cedefop will also designate the Contact Person in charge of handling the contact with the 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 sub-contracting is above 40% of the work by value) as requested in point 4.2.

5.3 Financial evaluation

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

5.4 Financial proposal

The financial offer must be clear and in compliance with the tender specifications. The Financial Proposal should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderer must fill-in the following Price schedule (table 1) and present a detailed breakdown of the price offered. The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5). All services that shall be procured should be included.

Price Schedule - Table 1

Services		Price
a)	Price to carry out all the activities described in the technical proposal (including proof-reading/editing in English of final report – see point 2.4, last paragraph)	(I) Number of person-days:* (II) Price per person-day:* Sub Total (1) = (I) + (II) =
b)	All estimated travel, accommodation, etc. expenses related to performance of the tasks (indication of total amount – see point 2.6, 2 nd paragraph)	Sub Total (2) =
c)	Attending 3 one-day meetings at Cedefop premises (indication of total amount for all 3 meetings – see point 2.5 and 2.6, 1 st paragraph)	Sub Total (3) =
Total price: sum of sub totals (1+2+3):		

*Distinguish between:

Expert/senior researcher - Junior researcher - Secretary/assistant - External expert (if applicable)

The estimated total number of working days must be justified by the methodology and work organisation.

Information concerning price

- The prices quoted must be fixed and are not revisable.
- Prices must be quoted in euro and include all expenses.
- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract in Annex B).
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately (this applies only to tenderers established in Greece): ... EUR.

6 Information on presentation and content of tender

It is important that tenderers provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should fully respect the instructions indicated under points 2, 3 and 4 of this open invitation to tender.

In addition, below you will find details of the required documentation.

6.1 Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 3 as found in Annex G
- 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
- 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.

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

6.2 Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

- the technical proposal providing all information requested in point 5.2, including information relevant to subcontracting as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the financial proposal containing all information requested in point 5.4

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

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

(Given as separate file in *.doc)

ANNEX D

LEGAL ENTITY FORM

Legal Entity Form to be downloaded, depending on the nationality and legal status of the tenderer, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

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

ANNEX E

FINANCIAL IDENTIFICATION FORM

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

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

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

PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please Tick ✓ the boxes provided

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s) entitled to sign contract)	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Exclusion Criteria Declaration (including those of consortium members and subcontractors, if applicable)	3.1 & Annex C	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2	☐	☐	
- Annex G (Questionnaires 1- 3)	3.2, 3.3, 4.1	☐	☐	
- Legal Entity Form	3.3 & Annex D	☐	☐	
- Financial Identification Form	6.1 & Annex E	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (models 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2 & Annex J	☐	☐	
- 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 to 3

(Given as separate files in *.doc)

ANNEX H – Cedefop’s Style Manual

(Given as separate file in *.pdf)

ANNEX I

POWER OF ATTORNEY (Model 1 & 2)

(Given as separate files in *.doc)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate file in *.doc)