

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

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 17/12/2012
RS/PRO/CALU/2012/1150**OPEN INVITATION TO TENDER****AO/RPA/NSOFRO-AZU/Full-Scale-European-Employer-Survey/023/12****‘Implementation of an employer survey on skill needs in Europe’*****Contract notice No 2012/S 242-397076 of 15/12/2012***

Dear Sir/Madam,

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

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

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

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

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service, Attention of Mr G. Paraskevaïdis
PO Box 22 427
GR – 55102 Thessaloniki, Greece**

Important:

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

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

- ✓ *that they have submitted an offer in time, and*
- ✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*

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

OR

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

OR

(b2) delivered by hand not later than **the date and time specified in the timetable in point 8 below**, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

to the following address (for points **(b1)** and **(b2)** above):

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service, Attention of Mr G. Paraskevaïdis
123, Europe Str,
GR-57001 Thessaloniki-Pylea, Greece
Tel: +30 2310 490111 / 490 064**

Please note that Cedefop is open from 09h00 to 17h00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

3. Tenders must be submitted strictly adhering to the following.

Tenders must be submitted in a sealed envelope itself enclosed within a second sealed envelope. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

The **outer envelope**, addressed simply to Cedefop (address depending on the means of submission, see point 2 above), should only bear additionally **the name and address** of the sender.

The **inner envelope**, addressed to the Procurement Service as indicated under point 2 above, must bear a self-adhesive label with the indication “**Open Invitation to tender – Not to be opened by the internal mail service**” and all the necessary information, as shown below:

OPEN INVITATION TO TENDER CEDEFOP No: AO/RPA/NSOFRO-AZU/Full-Scale-European-Employer-Survey/023/12 ‘Implementation of an employer survey on skill needs in Europe’ Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE
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The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in point 6 of the attached Tender Specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible. It is mandatory to include in the offer a **Cover Letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
5. **Submission of a tender implies acceptance of all the terms and conditions set out in this Invitation to Tender, in the specifications and in the draft contract** and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on the date and time specified in the timetable in point 8 below. Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

7.1 Contacts before the final date for submission of tenders:

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

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

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

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

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

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

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	29/01/2013	17.00h
Last date on which clarifications are issued by Cedefop	< as soon as possible >	N/A
Deadline for submission of tenders (hand delivered)	06/02/2013	17.00h
Deadline for submission of tenders by post / courier	06/02/2013	N/A
Validity of the tenders	06/08/2013	N/A
Tender opening session	18/02/2013	11.00h

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon:
 - the signature of an Order under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.
 You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data
14. Your personal data (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:
 - the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/info_contract/legal_entities_en.htm), or
 - the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).
15. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaidis

Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

**AO/RPA/NSOFRO-AZU/Full-Scale-European-
Employer-Survey/023/12**

***‘Implementation of an employer survey on skill needs in
Europe’***

Tender Specifications

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Annex K:	Financial offer (3 tables)

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).

- **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.

⁽¹⁾ Cedefop also works with Iceland and Norway.

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

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

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

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

CEDEFOP'S INFORMATION

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

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

1 Overview of this tender

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

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

1.1 Description and type of the contract

- *Title of the contract:* 'Implementation of an employer survey on skill needs in Europe'
- Cedefop will offer a single framework contract to the selected service provider/consortium to implement an employer survey to identify skill needs in Europe. The aim is to refine the survey instrument piloted by Cedefop in 2012, collect data and deliver a dataset which enables Cedefop and other stakeholders to carry out qualitative and quantitative analysis of emerging skill needs in organizations of different sizes covering the whole economy (including non-marketed services) in all EU Member States. Next to the dataset, relevant reports should be provided.

The activities envisaged in the course of the framework contract will mainly contribute to Cedefop research on skill needs and skill mismatch in Europe and the European Commission's flagship initiative on New Skills and Jobs (see description in '2. Technical specifications').

The framework contract establishes the basic terms for a series of specific work assignments and work packages to be concluded over a period of maximum 4 years (4 x 1 year), particularly as regards the subject, price and implementing conditions.

For each specific work assignment, an order form will be issued by Cedefop. The order form and its annexes will stipulate the tasks to be performed by the contractor, the timetable, the budget, the human resources/experts to be allocated and the reports to be submitted. All order forms will be finalised upon agreement between Cedefop and the contractor in accordance with the terms of the Framework contract and its annexes.

In drawing up their bids, tenderers must take account of, and thus accept, the terms and conditions of the standard framework contract attached to the specifications (Annex B).

- *Type of contract:* service framework 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 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 total budget for the required services described in this call for tenders is of the order of **4,000,000 EUR (without VAT)** over the entire duration of the framework contract (*maximum 4 years in total*).

Total budget (estimate)	4,000,000 €
Phase 1 work assignment (budget estimate)	400,000 €
Phase 2 work assignment (budget estimate)	3,100,000 €
Any possible additional assignments during the course of the Framework contract (budget estimate)	500,000 €

Tenderers should be aware that the above estimates are purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. Subsets of services will make the object of specific order forms to be signed with the contractor throughout the period of validity of the framework contract.

The sum of the amounts of the successive Order Forms that will be issued during the course of the Framework Contract may not reach the a.m. estimated value for the Framework Contract. Cedefop will be contractually bound **only** by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through orders forms.

1.6 Duration of the contract

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

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 Technical Specifications

2.1 Background

This invitation to tender is being issued against the background of widely recognised need and growing interest in the early identification and anticipation of skill and competence needs. Policy-makers increasingly recognise the value of anticipating skill trends to support evidence-based policy-making, as highlighted in the European Commission's Communication 'New Skills for New Jobs'⁽²⁾ and in one of the flagship initiatives of the Europe 2020 strategy, the 'Agenda for new skills and jobs'⁽³⁾.

Cedefop's analysis of skill demand and skill supply in Europe provides a core input to debates on future developments in European labour markets. By examining developments in economic sectors, occupations and skills, Cedefop provides a much needed assessment of trends in skills in the EU and its Member States. In particular, Cedefop's produces skill demand and skill supply forecast, analyses skill mismatch and investigates skill and competence needs in sectors and in enterprises. All these activities support the implementation of the European Commission's strategy and initiatives mentioned above. In this context, Cedefop's activities of skill forecasting and the employer survey on skill needs are supported financially by the European Commission, Directorate General for Employment, Social Affairs and Equal Opportunities.

To foster cooperation in the field of skill needs analysis, Cedefop established in 2004 a network to bring together highly qualified experts – Skillsnet - who present and discuss research and analysis methods and outcomes on new and changing skill needs as well as the medium- to longer-term perspectives for skills on the labour market. As transferring findings into policy and implementing reforms is of central importance and remain a key challenge, Skillsnet actively involves policy-makers, social partners, practitioners and researchers in discussions on research outcomes

2.2 European employer survey on skill needs⁽⁴⁾

In 2007, Cedefop started exploring the potential of employer surveys as a tool to identify skill needs and skill gaps, and reflecting upon a common European approach to obtain information and data from employers on their skill needs.

After a series of expert workshops it was decided to examine closely three potential options: adjusting national surveys to achieve comparability of results, modifying existing European surveys by including questions on skill needs, launching a new European employer skills survey. A feasibility work⁽⁵⁾ started in the beginning of 2009 and concluded that the only option that allows full comparability of results across countries is a new survey at European level dedicated specifically to the identification of skill needs in enterprises.

In 2010, Cedefop started to develop a pilot employer survey on skill needs in Europe with the aim to investigate the changing skill needs of enterprises in countries, sectors and occupations, and what drives the differences. An innovative task-related approach to skill needs measurement was chosen covering both generic skill domains as well as occupation-specific task domains.

The pilot survey conducted in 2012 successfully validated the approach taken to measuring changing skill needs for the perspective of employers in a variety of occupations and sectors in nine EU countries. However, scaling-up the survey to the whole EU requires an implementation design that is cost-effective and generates robust country estimates, while retaining the approach and qualities of the pilot.

⁽²⁾ The Commission Communication 'New Skills for New Jobs' (COM(2008) 868, 16.12.2008) is available at <http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008DC0868:EN:NOT>.

⁽³⁾ The Commission Communication 'An Agenda for new skills and jobs: A European contribution towards full employment' (COM(2010) 682, 23.11.2010) is available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010DC0682:EN:NOT>

⁽⁴⁾ <http://www.cedefop.europa.eu/EN/about-cedefop/projects/employers-surveys/employers-surveys.aspx>

⁽⁵⁾ The draft final report of this study is available for tenderers upon request from Cedefop.

A number of refinements to the pilot questionnaire and survey design are required to collect representative information on skill needs in Europe. The 2012 pilot survey tested the approach on selected occupations at ISCO-08 3-digit level. However for the full-scale survey reporting on occupations at ISCO-08 1-digit ⁽⁶⁾ level is required to improve the cost-effectiveness of the survey while covering the entire EU economy and broad occupational groups. To ensure meaningful responses from employers this could be done, for example, through the collection of data at a lower ISCO-08 level and subsequent aggregation to ISCO-08 1-digit level. Modifications to the design should also allow implementation of the survey instrument for repeated measures of 2 to 3 occupations per local establishment.

It is also necessary to improve the comparability and validity of the importance scales used to measure skills needs across countries in the survey, e.g. by using a frequency scale as alternative scale or as an anchor scale. Another possibility is to use anchoring vignettes.

The refined survey instrument will focus on transversal/generic skills. The 2012 pilot survey already contained a number of skills domains ⁽⁷⁾. This list worked well across countries, sectors and occupations but it will need to be refined to

- ensure synergies with other on-going projects and initiatives such as ESCO ⁽⁸⁾ developments and other lists of generic/transversal skills available, including the European key competences framework ⁽⁹⁾ or the Europass (competence descriptors for ICT skills) ⁽¹⁰⁾;
- improve alignment with policy needs so that the coverage of ‘green skills’, ‘ICT skills’, and a set of ‘social/communication skills’ reflect the emphasis put on those skills in the recent Communication of the European Commission ‘Towards a job-rich recovery’.

These refinements are to be guided by Cedefop and will need to be pre-tested again in five selected countries. Based on the results of the pre-test, Cedefop together with the European Commission will take a decision on the implementation of the final survey instrument (Phase 2).

Challenging issues that are critical to the success of the survey include:

- whether coherent and meaningful information concerning skills needs can be presented at ISCO-08 1-digit level (while possibly being collected from employers for more detailed occupational sub-groups);
- whether the required level of precision of standard errors can be reached with a feasible number of observations;
- whether the efficiency of the design can be improved by using a simplified set of items with a repeated measures design in a way that does not make the survey load excessive for respondents, and the levels of unit non-response;
- whether the task importance scale can be made sufficiently comparable across countries by further development of the instrument, either by including some items that measure the frequency of a task or by the use of anchoring vignettes.

⁽⁶⁾ The International Standard Classification of Occupations, 2008 (ISCO-08) distinguishes between the following major groups at 1-digit level: 1) Managers, 2) Professionals, 3) Technicians and associate professionals, 4) Clerical support workers, 5) Service and sales workers, 6) Skilled agricultural and fishery workers, 7) Craft and related trade workers, 8) Plant and machine operators and assemblers, 9) Elementary occupations and 0) Armed forces occupations. The latter Group 0, covering the Armed forces, is to be excluded from the present survey.

⁽⁷⁾ Cognitive skills (literacy, maths, problem-solving, foreign language); Learning to learn skills (task discretion, learning new ideas, adapting), Social skills (persuading, instructing, team-working), Green skills (saving resource, reducing pollution, adapting practice to green standards) and ICT skills

⁽⁸⁾ European Skills, Competences and Occupations taxonomy
(<http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=852>)

⁽⁹⁾ http://ec.europa.eu/education/lifelong-learning-policy/key_en.htm

⁽¹⁰⁾ http://ec.europa.eu/education/lifelong-learning-policy/europass_en.htm

Questionnaire and summary report from the 2012 pilot survey

are available upon request from Cedefop

2.3 General purpose of this contract and specific objectives

2.3.1 Purpose

The purpose of this contract is to refine, pre-test and implement a survey instrument - *a European employer survey on skills needs* - derived from the 2012 pilot survey to reliably identify changing skill needs across occupations in Europe, covering the whole economy. The survey will be addressed to a representative sample of employers in local establishments in all European Member States.

The principal aim is to deliver a dataset and initial results which will enable Cedefop and other stakeholders to carry out qualitative and quantitative analysis of emerging skill needs in organizations of different sizes covering the whole economy (including non-marketed services) in all EU Member States. The European employer survey on skill needs will use appropriate sample stratification and weighting to produce robust country estimates, as well as a European level analysis of trends in sectors.

The contract covers the final refinement of the required survey outcomes and related data needs, modification of the survey instrument (questionnaire and appropriate statistical methodology), preparation of a full-scale survey, including development of national versions of the questionnaire, and implementation of the full-scale survey at EU-27 level, including fieldwork, data processing and a first report of results at the level of a descriptive overview of initial results.

The refinement of the survey instrument includes close collaboration with Cedefop on detailed specification of required outcomes and statistical methodology to collect representative data according to the firm size and economic sector on skill needs in Europe based on adaptations to the pilot survey. Cedefop will lead the conceptual refinements and the contractor is expected to provide expert advice and implement the agreed concepts.

The pre-test phase should verify in five countries jointly selected by Cedefop and the future contractor the whole survey approach and statistical methodology, including the relevance of the questions and availability of information/data in enterprises. As a result, a detailed, robust and validated methodology should be made available for future regular use that ensures data according to agreed international quality standards.

Full-scale implementation of the survey in all EU Member States is conditional upon successful outcomes of the pre-test and validation of the refined survey instruments and methodology.

2.3.2 Specific objectives

The final survey instrument and delivered dataset should enable Cedefop to satisfy the following specific objectives:

- Obtain interesting, and sufficiently discriminatory, information on trends in transversal/generic skills in occupations across countries using the broad occupational groups defined by the ISCO-08 1-digit level;
- Describe employers' needs for a focussed set of key transversal/generic skills removing redundancy among items in the Pilot instrument. Thus, making room for the addition of further green and ICT tasks;
- Under guidance from Cedefop, the contractor will improve the comparability and validity of the importance scales used to measure skills needs as well as increase the precision of the estimates with an improved survey design;
- Streamline the coding of responses to qualitative items which measure newly emerging tasks, to improve up the method used in the Pilot where due to the low numbers in each occupational group they were analysed and interpreted directly rather than using software;

- Measure drivers of change in skill needs across enterprises and provide an EU wide overview of their impact along with other relevant background variables;
- Provide appropriate sampling weights to allow for the presentation of sector-level information at an aggregate EU-27 level;
- Include variables suitable for subsequent secondary analysis using statistical methods such as generalized linear and multilevel models, i.e. well defined background and drivers of change variables, including appropriate derived variables that enable further analytical work;
- Release an anonymised version of the dataset for use by third-party researchers.

2.4 Work packages, tasks and planning

The work will be carried out in two main phases:

1. Improvement of the survey instrument and pre-tests
2. Preparation and implementation of the full-scale survey

Execution of the second phase will be conditional to the success of the testing in the prior phase. At the end of phase 1, Cedefop and the European Commission will decide on the execution of phase 2, based on the results of the pre-test. The two distinct phases with related work packages will be subject to different order forms ⁽¹¹⁾.

The results in different stages of the work will be discussed with Cedefop, expert members of Cedefop's Skillsnet and representatives of the European Commission. The contractor will have to closely take into account relevant comments and suggestions. Meetings with experts and representatives of the European Commission will be organised by Cedefop and are not subject of this contract (see also 2.6).

The following work packages are defined for each phase foreseen over the duration of the framework contract. Indication of the estimated year of their start is provided:

Work package	Key tasks	Estimated year of start
Phase 1: Improvement of the survey instrument and pre-tests		
WP1	Specification of survey outcomes, statistical methodology and guidelines Fine-tune in close collaboration with Cedefop the required outcomes of a full-scale survey and related data needs (based on the 2012 pilot results). Refine and develop the detailed and complete employer sample survey. The detailed statistical methodology should mainly include: • concepts, definitions and classifications to be used; • implementation guidelines (organisation/planning and methods of data collection (CATI); • strategies to achieve the required net sample size); • sampling (required sampling frame, target population and statistical unit, sample size calculation method to ensure given precision requirements agreed by Cedefop, sampling and weighting methods, estimation methods); • data processing (standard code book, editing and checking rules, treatment of unit and item non-response). Develop a survey design which ensures that percentage measures in the ISCO 1-digit occupation groups, within countries, have standard errors of no larger than 2.5 for a point estimate of 50% across two categories, given sufficient available observations in the universe. For independent observations with binomial sampling this equates to at least 400 respondents per occupational group for a given country. More complex survey designs with clustered observations will require allowing for the dependency among observations induced by the design when calculating standard errors and hence the actual number of observations needed in each country.	Spring 2013

⁽¹¹⁾ Given the large extent of Phase 2, it may be divided into several order forms.

WP2	Adaptation of the master questionnaire In light of the conceptual decisions taken by Cedefop, revise the existing English master questionnaire (available upon request) focussing on generic, green and ICT skills as well as on emerging tasks while simplifying and removing redundancies from the list of transversal/generic skills in the Pilot. In close cooperation with Cedefop ensure that the required policy/research outcomes of the survey are realised as specific questions and statistically measurable variables. Explore the utility of both importance and frequency measures of skills needs. Ensure that the formulation of questions is suitable for the comparative context and use a language understandable to enterprises and employers to enable the most valid, reliable and comparable measurement. Provide a list of definitions for key terms used in the questionnaire.	2013
WP3	Preparation of national questionnaires and pre-tests in five countries Propose a rigorous translation and assessment strategy ensuring the highest quality of national questionnaires (use of back translation desirable). Translate the master questionnaire to produce respective national questionnaires for the pre-test countries. Develop and carry out pre-tests of at least 50 establishments in each of the selected countries, analyse the results and revise the master and national questionnaire(s) in the light of the outcome of the pre-tests.	2013
Phase 2: Preparation and implementation of the full-scale survey		
WP4	Preparation of the full-scale survey Based on the refined statistical methodology and survey guidelines, develop a detailed planning and organisation as well as timetable and quality control measures for all stages of the practical implementation of the full-scale survey in all EU countries at that time (EU-27 + Croatia). Translate the master questionnaire and develop respective national questionnaires for the 23 additional countries forming the full scale survey. Propose suitable method for validation of national questionnaires, including back translation.	Late 2013
WP5	Fieldwork Carry out the fieldwork and collect data according to the agreed survey methodology (CATI) and guidelines, including the implementation of procedures and quality measures to ensure the required net sample size (suggested 1700 to 2000 establishments in each of the EU countries (EU-27+Croatia), depending on the final design) and data quality checks. Ensure the required basis for non-response analysis. Submit regular progress reports to Cedefop detailing achievements during fieldwork, including biweekly response and cooperation rate summaries for each country.	2014
WP6	Data processing and quality assessment Process, edit and check the data according to the developed methodology. Implement item non-response treatment, and weighting and estimation procedures. Produce a quality report including coverage for each of the countries including technical aspects and stages of the survey implementation (use the Eurostat standard quality report as a guide). In addition to a complete micro dataset to be given to Cedefop, produce an anonymised dataset suitable for use by third-party researchers, with accompanying documentation and the SPSS or STATA syntax used to generate summary statistics with their corresponding design-based standard errors and statistical tests.	2014
WP7	Data analysis, initial findings survey report Provide an initial analysis of the data in the form of 30 to 40 detailed key sets of tabulations agreed by Cedefop for point estimates with their standard errors. Produce an initial findings report of the survey results on skill needs described in relation to drivers of change and relevant background variables. The report should include initial conclusions regarding the required outcomes achieved and their relevance for the key political and research questions identified within WP1.	Early 2015

There may be additional work packages/tasks to be carried out during the course of the framework contract which cannot be specified at this stage (see table in point 1.5 for an indication of budget estimate/additional assignments). The tenderer is not requested to include any related information in his tender. Cedefop will, as a guide, provide in due time an annual schedule of anticipated work packages/tasks.

2.5 Deliverables (data and reports) and timetable

The specific activities and reports covered by this framework contract must be implemented by the deadlines which will be laid down by Cedefop in each specific order form.

However, an indicative calendar of activities and deliverables is the following:

Phase 1 work assignment: Improvement of the survey instrument and pre-tests

The phase 1 work assignment should focus on the following work packages (as indicated in 2.4):

WP1 – Specification of required survey outcomes, statistical methodology and guidelines

WP2 – Adaptation of the master questionnaire

WP3 – Development of national questionnaires and pre-tests

Indicative calendar for the phase 1	Related meetings with project managers at Cedefop
• start of the work: April 2013 • interim report: August 2013 • final report: November 2013	• at the start of the work (an inception meeting) • upon submission of the interim report • at the end of the phase (the final results meeting)

Phase 2 work assignment: Preparation and implementation of the full-scale survey

The phase 2 work assignment should focus on the following work packages (as indicated in 2.4):

WP4 – Preparation of the full-scale survey

WP5 – Fieldwork

WP6 – Data processing and quality assessment

WP7 – Data analysis and initial findings survey report

Indicative calendar for the phase 2	Related meetings with project managers at Cedefop
• start of the work: December 2013 • interim report: June 2014 • final report: February 2015	• at the start of the work (an inception meeting) • upon submission of the interim report • at the end of the phase (the final results meeting)

The following reports will be required within each phase:

Short inception report due 1 month after the inception meeting, to fine-tune the proposed methodology, the work plan and the timetable for the work assignment;

Interim report to present work progress, the structure of the final outcome, difficulties encountered and solutions implemented (as necessary);

Final report should include summary and key findings, a detailed presentation of the methodology and results, conclusions and recommendations in the following structure:

- a summary report with key findings and conclusions of the respective phase (approx. 20 pages);
- a full report presenting the approaches and main results (approx. 100 pages) as well as an annex with tables;
- a technical and quality assurance report with a detailed description of the methodology, software and data used.

Cedefop will provide comments on both the interim report and the final report. The contractor will address those comments, liaising closely with Cedefop's project manager.

Reports shall be submitted to Cedefop in English. They should be submitted in Microsoft Word with all tables, graphs or images included at the appropriate place in the text. The report shall be supplemented by any graphs, tables and images in the appropriate software and by the statistical databases used during research (to allow for Cedefop's check). Reports shall be drafted in compliance with the requirements of Cedefop style manual attached in Annex H.

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 overall cost of preparation and submission of the deliverables (reporting costs) and of proofreading/editing should be included in the Financial Proposal (see Annex K, Price schedule table 1, 3c) as well as 6c)).

The data must be delivered in electronic format as an SPSS SAV format file. This file must contain all raw data gathered for all countries covered by the survey, plus national and cross-national weighting information. All labelling must be in English and will be made as user-friendly as possible within the constraints of the SPSS-PC (e.g. using key words). The syntax files used for data processing and weighting must be supplied. In addition, it is required to deliver the data in ASCII text data file in fixed-format (i.e. values padded to fixed character widths) or in comma-delimited format, so it can be used by software other than SPSS if required.

Payment of the balance is conditional on Cedefop's acceptance of a revised final report.

2.6 Meeting and travel expenses

As referred in point 2.5, the contractor will be requested to attend in total six one-day scheduled meetings (1-2 persons) at Cedefop with the team responsible for the project. All costs incurred (travel, accommodation, etc.) related to these meetings **as well as** other travel, accommodation, etc. expenses that may occur in performing the tasks as described in points 2.4 and 2.5 (research team meetings, etc.) have to be included in the financial offer (see Annex K, Price schedule table 1), 2a) and 2b) as well as 5a) and 5b)).

The contractor will be asked to present the proposal and results achieved so far during dedicated Skillsnet conferences/expert workshops/focus groups on employer surveys as a tool for identification of skill needs. This will enable the contractor to discuss the methodology with European experts and stakeholders in the field. The related travel expenses for Skillsnet conferences/expert workshops shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

Other meetings with Cedefop apart from those mentioned above that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

3 Specific information concerning participation to this tender

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the Declaration on Exclusion criteria and Absence of conflict of interest, given in Annex C. Therefore all tenderers, all group (consortium) members (if any) and any subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) **MUST** provide the self-declaration found in Annex C duly signed and dated. The exclusion criteria will be assessed in relation to each company individually.

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

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

3.2 Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed statements from those entities. 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 of the tenderer for the last three financial years concerning the type of **services** covered in this call for tenders should be at least **1,000,000 €**.

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 two financial years concerning the type of services similar in nature to those making the subject of this call for tenders.

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.

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, he or she will be required to justify the non

provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2 Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract. They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference. In particular, the tenderer must comply with the following requirements:

- possession of an empirical data collection infrastructure for carrying out a survey among enterprises/local establishments in all EU Member States;
- at least **three (3) contracts** performed within the last **five (5) years** in the field of development, design and implementation of large-scale surveys, including handling and analysing appropriate data sets. At least **one (1)** of these three (3) contracts must concern an international survey and at least **one (1)** an employer/enterprise survey;
- for the team leader at least **five (5) years** of individual experience in managing international empirical data collection projects in social science contexts, including the linguistic capacity to understand, speak and write to a high standard in English (at C1 level at least);
- for each team member at least **two (2) years** individual experience in the field of empirical data collection in social science contexts, including the linguistic capacity to understand, speak and write to a high standard in English (at B2 level at least);
 - for at least one team member a minimum of **three (3) years** of experience in the field of development, design and implementation of employer/enterprise surveys;
 - for at least one team member a minimum of **three (3) years** of experience in the field of development, design and implementation of skills surveys.

Proofs / Evidences of Technical and professional capacity

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

- brief company profile (**please fill-in Annex G**) including a description of the tenderer's study and research capacity (empirical data collection infrastructure, including network of national contact points, expertise, facilities, etc.) to develop, design and carry out telephone employer/enterprise surveys and to select, handle and analyse appropriate national and international data sets;
- a list of contracts/projects/studies consistent to the above mentioned criteria, carried out by the tenderer over the past **five (5) years** in the above mentioned field of research, describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer;
- the detailed CVs of the team leader and other team members proposed to implement the contract. CVs should include information aimed at demonstrating the professional capacity of the team members as above required, attested also by a list of (scientific) publications. They should also present the linguistic abilities in English. The tenderers are welcome to use the **Europass** CV format.

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

3.3 Legal Position

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

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

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

4 Additional information concerning participation to this tender 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 106 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 34 countries, namely: the 27 EU member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, FYROM, Albania and Montenegro).

The procurement (tender) procedures of Cedefop are **not** open to tenderers from GPA countries.

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

4.1 Joint Offers/ Groupings (Consortia)

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

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

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

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

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

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

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

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

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

4.2 Subcontracting/Subcontractors

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

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault. Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

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

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

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

5 Award of the contract

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

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

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

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

Whereby:

TQV = Total Quality Value of the tender (as per points 5.1 and 5.2);

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

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 award (evaluation) criteria 1, 3 and/or 4 and obtained at least **40** points out of 65 for award criterion 2 and/or in total a minimum of **75** 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 – Sound understanding of the purpose of the activities to be carried out in the context of the framework contract and challenges involved **(10 points)**;
- Award criterion 2 – Relevance and soundness of the methods and approaches proposed to carry out the tasks **(65 points)**
 - ✓ Award criterion 2.1. Adoption of scientific principles of survey design, including sampling approach; proposed sampling population (universe); nature of stratification required by the sampling design; use of up-to-date list of existing registers of potential interviewees; adoption of appropriate weighting procedures; methodology for ensuring effective data collection of achieved sample sizes with minimum number of missing observations meeting or exceeding the required level of precision as stated in section 2.4 WP1; adaptation of the master questionnaire **(40 points)**;
 - ✓ Award criterion 2.2. Description of pre-tests carried out to analyse and evaluate the master questionnaire prior to the implementation of the fieldwork **(20 points)**;
 - ✓ Award criterion 2.3. Suggested translation process to ensure the accuracy and consistency of the master English questionnaire with respective national questionnaires in each individual country surveyed **(5 points)**;
- Award criterion 3 – Appropriateness of the allocation of human resources/experts and in relation to the type of activities to be carried out, including nature of coordination of national contact points in carrying out the survey in individual Member States and external experts in case of consortium or sub-contracting **(10 points)**;

- Award criterion 4 – Project organisation and mechanisms to guarantee continuous services in adequate quality and expertise during the entire duration of the framework contract, including relevant risk assessment **(15 points)**.

In order to guarantee a minimum threshold of quality, offers that

- do not reach a minimum of **50%** of the possible score for award criteria 1, 3 and 4, and/or
- do not reach a minimum of **40** points out of 65 for award criterion 2, and/or
- obtain an overall total score (Total Quality value) of less than the total **75** (of a maximum of 100) points against the award (technical) criteria,

will not be considered acceptable and will be eliminated from further evaluation. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.3).

5.2 Technical proposal

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

Tenderers are requested to organise the technical 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 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 with) all requirements outlined in the Terms of Reference.

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

- **For award criterion 1** a concise discussion of the subject demonstrating in-depth understanding of the objectives, concepts, methodologies and research issues in enterprise surveys and of the specific challenges of an employer survey on skill needs on skill measurement (maximum 5 pages);
- **For award criterion 2**
 - A detailed description of the methodological approach to carry out the full-scale survey in 28 EU countries (sampling scheme - larger sample sizes offering greater precision are to be preferred; stratification if any; weighting procedures; use of good quality list of registers of potential interviewees; application of appropriate probability sampling procedures for surveying local establishments; adaptation of the master questionnaire) to be followed to carry out the tasks specified in **Phase 1 and Phase 2** (see the structure and specifications in section 2.4), including proposals for issues arising with small countries;
 - Identification of the pre-testing methodology to be used to fulfil the requirements of WP3 for **5 selected countries - for the purposes of evaluation, the list is Germany, Spain, Finland, Ireland and Poland**, describing the use of appropriate cognitive and/or real life interviews to validate definitions and questions used in the survey, the nature of subsequent analysis, including possible interpretations of the outcomes of the pre-tests regarding the terms used in the questions and suggested improvements to, and consideration of, country specificities and requirements of skill surveys;
 - Proposed translation services and methods to be used to fulfil the requirements of WP3 and WP4, including the phases of translation of master questionnaire to the target language, reconciliation steps to ensure consistency between the master and translated versions, back translation and necessary translation checks by native speakers, including proofreading.
- **For award criterion 3** a description of the work organisation and management, i.e. the team to be assigned to the project, distribution of tasks among them according to their expertise, including national contact points or agencies to carry out the survey and external experts in case of consortium or sub-contracting;
- **For award criterion 4** a detailed time-table with descriptions of the deliverables and different stages of work to ensure that the project organisation can respond appropriately to the request from Cedefop for each specific work package, including an analysis of the difficulties likely to be encountered (methodological and others) in carrying out the work and an indication of how the tenderer intends to address these difficulties (risk assessment).

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. 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.

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 in total **75** points or more (of a maximum of 100 points) against the technical award criteria and/or **40** points or more for the award criterion 2 and/or **50%** or more of the possible score for award (evaluation) criteria 1, 3 and 4 will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer - TFO**) in point 7) in the Price schedule table 1 in Annex K (see below section 5.4 Financial Scenario).

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)

Information concerning price

- The prices quoted must be fixed and not revisable for the first year of the contract. (For subsequent years, see draft Framework contract in Annex B, Article I.3.3).
- Prices must be quoted in EURO and include all expenses.
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.

5.4 Financial Scenario

The financial scenario must be clear and in compliance with the tender specifications.

The Financial Scenario should indicate the total price in order **to carry out all the activities of Phase 1 and Phase 2** described in the Terms of Reference. The tenderers must fill-in the Price schedule table 1 (Phase 1 and Phase 2) in Annex K and present a detailed breakdown of the price offered.

Please ensure that all figures are entered in the requested fields of the Price Schedule table 1.

The Financial Scenario should clearly match the Terms of Reference and the estimate of value (if any). All services that shall be procured should be included.

Outside of the scope of the evaluation, the tenderers are also requested to fill in table 2 and table 3 in Annex K. The figures given by the tenderers in both tables will be used for the completion of future order forms.

In case of future additional assignments, the unit prices offered in Annex K will be used by analogy for issuing the related order forms.

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

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

Please note that Cedefop estimates for quantities are indicative and do not constitute any kind of legal obligation for the Centre.

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 and Annex K.

ANNEX A

CONTRACT NOTICE

(Given as a separate file in *.pdf format)

ANNEX B

DRAFT CONTRACT

(Given as a separate file in *.pdf format)

ANNEX C

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

(Given as a 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.

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PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

(Given as a separate file in *.doc format)

ANNEX G

Questionnaires 1-4

(Given as a separate file in *.doc format)

ANNEX H

CEDEFOP STYLE MANUAL ANNEX I

MODELS of POWER OF ATTORNEY

(Given as a separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as a separate file in *.doc format)