

FINANCE AND PROCUREMENT

RS/PRO/CALU/RB(2014)1980
Thessaloniki, 11 August 2014

OPEN INVITATION TO TENDER

Provision of data analysis and intelligence on skills and labour markets

AO/RPA/AZU-ILIVAN/skills-intelligence/012/14

REFERENCE: *Contract notice – 2014/S-152-272354 of 09/08/2014*

Dear Sir/Madam,

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

The purpose of this call for tenders 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 <i>CEDEFOP No: AO/RPA/AZU-ILIVAN/skills-intelligence/012/14</i> <i>“Provision of data analysis and intelligence on skills and labour markets”</i> 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 section 6 of the attached Tender Specifications.

Tenderers should not disclose their financial offer in any part of their tender other than the sealed envelope C, not even disclose the total amount of their financial offer on the cover letter.

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)	02/10/14	17.00h
Last date on which clarifications are issued by Cedefop	As soon as possible	N/A
Deadline for submission of tenders (hand delivered)	10/10/14	17.00h
Deadline for submission of tenders by post / courier	10/10/14	N/A
Validity of the tenders	10/04/15	N/A
Tender opening session	23/10/14	11.00h
Estimated contract signature date	Mid-December 2014	

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.

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.

12. 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

13. 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).
14. All tenderers will be informed in writing of the results of this tender procedure.
15. Once Cedefop has opened the tender, the document shall become the property of Cedefop and it shall be treated confidentially.
16. You will be informed of the outcome of this procurement procedure by e-mail. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check it regularly.

Yours sincerely,

G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/RPA/AZU-ILIVAN/skills-intelligence/012/14

**‘Provision of data analysis and intelligence on skills and
labour markets’**

Tender Specifications

Table of contents

Introduction to Cedefop: Europe's agency for training policy	9
1. Overview of this tender procedure.....	11
1.1. Description and type of the contract	11
1.2. Place of delivery or performance	11
1.3. Division into lots	11
1.4. Variants.....	11
1.5. Value or quantity of purchase	12
1.6. Duration of the contract	12
1.7. Main terms of financing and payment.....	12
2. Terms of Reference	13
2.1. Background.....	13
2.2. General purpose and main services to be provided	14
2.3. Description of the services to be provided	16
2.4. Deliverables	18
2.5. Task assignment procedures	19
2.6. Meetings and travel expenses.....	19
3. Specific information concerning participation to this tender procedure	20
3.1. Exclusion criteria	20
3.2. Selection criteria.....	20
3.3. Legal Position.....	23
4. Additional information concerning participation to this tender procedure	24
4.1. Joint Offers/ Groupings (Consortia)	24
4.2. Subcontracting/Subcontractors	25
5. Award of the contract	27
5.1. Technical evaluation.....	27
5.2. Technical proposal	28
5.3. Financial evaluation.....	30
5.4. Financial Proposal.....	31
6. Information on presentation and content of tender	33
6.1. Envelope A - Supporting documents	33
6.2. Envelope B – Technical proposal	33
6.3. Envelope C – Financial proposal	33

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on Exclusion Criteria
Annex D:	Legal Entity Form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Questionnaires 1-5
Annex H:	Cedefop Style Manual/Referencing guide
Annex I:	Power of Attorney (Models 1 and 2)
Annex J:	Model of Letter of Intent for Subcontractor/s
Annex K:	Instructions for exercise (Award criterion 3)

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 supports the European Commission, Member States ⁽¹⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-14

Cedefop's activities are guided by its strategic objective and medium-term priorities 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. 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.

⁽¹⁾ Cedefop also works with Iceland and Norway.

- **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 job 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 sectorial 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.

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

1. OVERVIEW OF THIS TENDER PROCEDURE

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

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

1.1. Description and type of the contract

- a) Title of the contract: Provision of data analysis and intelligence on skills and labour markets
- b) Short description of content of this contract:
The purpose of this contract is to support Cedefop in providing data analysis and intelligence on skills and labour markets, primarily for the EU Skills Panorama, through:
(a) profiling the analytical needs and characteristics of target groups, (b) maintaining an inventory of relevant sources, data, and indicators, (c) engaging in data handling and analysis, (d) transforming skills and labour market data and qualitative information into customised intelligence, (e) providing regular updates on recent developments in the area of skills and the labour markets at European level and in all Member States and (f) organising and facilitating content-related workshops and focus groups.
- c) Type of contract:
Framework Service Contract whereby the services will be provided following the signature of Order Forms throughout its validity. The number and content of Order Forms will depend on the needs of Cedefop.

1.2. Place of delivery or performance

Most tasks will be completed in the Contractor's premises and when necessary in Cedefop's premises in Thessaloniki (e.g. face to face meetings).

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers **may not** offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **1,000,000 EUR (without VAT)** over a 4-year period. Tenderers should be aware that the information on volume is purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms that will be issued after the Framework Contract is signed 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 initial duration of one (1) year and 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 60 days of submission of invoices and at the conditions set out in the draft contract. Invoices shall be issued only after explicit acceptance by Cedefop project managers of the deliverables stated in the respective Order Forms.

2. TERMS OF REFERENCE

2.1. Background

Labour market information and intelligence can play an important role to support everyday decisions made either by individuals, companies or policy-makers. Availability of high quality information is essential for ensuring that individuals possess or are able to acquire appropriate skills demanded by the labour market, especially when dealing with the consequences of the recent economic recession. Despite the first signs of economic recovery, Europe is still facing several challenges likely affecting its labour market in the future. The ageing society calls for a more effective use of the labour force as there will be fewer young people to replace those leaving the labour market due to retirement. Currently, Europe is experiencing very high levels of (youth) unemployment and at the same time employers report that they cannot find employees with the right skills. Thus, there is a persistent need to identify the necessary skills to be developed so that individuals can successfully enter the future labour market. Moreover, the availability of the labour market information and intelligence is essential to enhance the responsiveness of education and training systems to labour market needs and to ensure appropriate skills matching.

Cedefop's analyses on skills in Europe provide a core input to debates on future developments in European labour markets. In particular, Cedefop regularly produces skill demand and skill supply forecasts since 2008 ⁽²⁾. To complement its forecasts, Cedefop is also analysing skill mismatch. The work carried out in this context in recent years has aimed to improving conceptual definitions and better understanding the impact of skill mismatch on vulnerable groups of the population ⁽³⁾. It has also examined the extent of skill shortages in EU labour markets and the importance of company and country characteristics ⁽⁴⁾, while it has constructed indicators of potential imbalances between labour supply and labour demand in EU Member States ⁽⁵⁾. Cedefop investigates and synthesises available research findings but also engages in own primary data collection, including the first European Skills Survey in 2014 ⁽⁶⁾, to inform the policy debate on tackling skill mismatches across EU labour markets ⁽⁷⁾.

To foster cooperation in the field of skill needs analysis, Cedefop established in 2004 Skillsnet – a network which brings together highly qualified experts, researchers, policy makers and practitioners. Skillsnet provides a platform to present and discuss research methods and outcomes on new and changing skill needs in the labour market. Skillsnet actively involves policy-makers, social partners, practitioners and researchers in discussions on research outcomes. To transfer findings into policies and implementing reforms is of central importance and remains a key challenge.

Cedefop's analyses on skills anticipation and skill mismatches form a key pillar of the *EU Skills Panorama* (EUSP) ⁽⁸⁾, identified within the Europe 2020 flagship initiative 'An Agenda for New Skills and Jobs'. The overall objectives of the EU Skills Panorama are to improve transparency

⁽²⁾ <http://www.cedefop.europa.eu/EN/about-cedefop/projects/forecasting-skill-demand-and-supply/skills-forecasts.aspx>

⁽³⁾ See Cedefop (2010), *The skill matching challenge: Analysing skill mismatch and policy implications*, available on-line: <http://www.cedefop.europa.eu/EN/publications/15275.aspx>; also Cedefop (2011), *Migrants, minorities, mismatch?* Available on-line: <http://www.cedefop.europa.eu/EN/publications/18670.aspx>

⁽⁴⁾ See Cedefop (2012), *Skill Mismatch: The Role of the Enterprise*, Cedefop Research Paper No. 21, available on-line: <http://www.cedefop.europa.eu/EN/publications/19658.aspx>

⁽⁵⁾ Cedefop (2013), *Identifying and analysing imbalances in the pan-European skill supply and demand forecast*, Available by Cedefop on demand.

⁽⁶⁾ Information on Cedefop's European Skills Survey is available at: <http://www.cedefop.europa.eu/EN/about-cedefop/projects/analysing-skill-mismatch/analysing-skill-mismatch.aspx>

⁽⁷⁾ Cedefop (2012), "The Skill Mismatch Challenge", in: EU Commission (2012), *Employment and Social Developments in Europe 2012*, Office for Official Publications: Luxembourg. Available on-line: <http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7315>

⁽⁸⁾ <http://euskills Panorama.ec.europa.eu/>

and mobility on the labour market, as well as to enhance the responsiveness of education and training systems to labour market demands. Consistent with these objectives the Panorama aims to act as a single access point which provides access to and promotes the use and dissemination of labour market intelligence. The Panorama presents a rich set of national, European and international research findings, data and indicators on skills and jobs as well as analytical highlights (short, concise briefs on specific topics of interest).

In January 2014, Cedefop took over the responsibility for further development of the EU Skills Panorama, in cooperation with the European Commission. Cedefop is currently working on developing a dynamic website with enriched data, information and intelligence for various target groups, starting with policy makers. Cedefop will coordinate and manage the work on both the content and technical development. The current contract will support Cedefop in providing the data analysis and intelligence for the new website. The support for technical development of the dynamic website is not subject of this contract ⁽⁹⁾.

2.2. General purpose and main services to be provided

The purpose of this contract is to support Cedefop in providing data analysis and intelligence on skills and the labour market, primarily for the EU Skills Panorama, through:

- a) profiling the analytical needs and characteristics of target groups,*
- b) maintaining an inventory of relevant sources, data, and indicators,*
- c) engaging in data handling and analysis,*
- d) transforming skills and labour market data and qualitative information into customised intelligence,*
- e) providing regular updates on recent developments in the area of skills and the labour market at European level and in all Member States and*
- f) organising and facilitating content-related workshops and focus groups.*

To accomplish these objectives, the Contractor should adopt a multi-methods approach using both quantitative and qualitative techniques and analysing both primary and secondary data and sources. A Contractor's strong research capacity as well as ability to communicate research findings/key messages to various target groups (in the form of intelligence) is essential for successful execution of the contract.

The underlying motivation for the contract is to collect information on skills and labour markets produced from different sources, including those of Cedefop, provide data processing and analysis where necessary, and transform it into intelligence ⁽¹⁰⁾. The deliverables produced under this contract will primarily be used for providing the content for the EU Skills Panorama. The actual display and implementation on the EU Skills Panorama website is not part of this contract.

Service (1) Profiling the needs and characteristics of key stakeholders

The data analysis and intelligence to be produced will aim at covering the needs of the various target groups or stakeholders, in particular policy makers, information, advice and guidance (IAG) practitioners, staff from public employment services as well as experts and potentially other groups. To be able to provide relevant analysis of data and transform it into useful intelligence, it is of utmost importance to understand the analytical needs of the target groups. Part of the services will, therefore, cover profiling the needs and characteristics of selected target groups, outlining their interests for data and intelligence and acknowledge the key challenges involved in preparing a central access point of data and intelligence aiming to accommodate their needs.

Service (2) Maintaining an inventory of relevant sources, data and indicators

⁽⁹⁾ Cedefop has another contract in place for designing, developing, deploying and promoting a dynamic EU Skills Panorama website.

⁽¹⁰⁾ For the purpose of this contract, the labour market intelligence is defined as interpretation of labour market information adapted to the needs of a particular target group.

To fulfil the purpose set above, the Contractor will be requested to review, complete, complement and maintain the inventory of available sources, datasets and indicators, developed in the context of previous and ongoing work for the EU Skills Panorama ⁽¹¹⁾. The objective will also cover inclusion of other existing indicators based on the latest literature or proposing the construction of new indicators, focusing on the various dimensions of interest (e.g. EU, country level, sector, occupation, and skill level). The primary focus will be on datasets and sources that offer comparability and are available at the EU Level (e.g. EU Labour Force Survey, Cedefop skills supply and demand forecasts); however a comprehensive overview of existing sources at the national level is also essential as they may be used to complement and enrich EU level data. The ultimate aim of the inventory is to identify the sources of information and explore possible uses that may be relevant for skills analysis and of interest to key stakeholders and target groups covered by the EU Skills Panorama. Thus, the Contractor has to ensure that all relevant European and national data are exploited.

Service (3) Engaging in data handling and analysis

To address the second service, the Contractor will be requested to engage in data handling and analysis. This objective will involve exploring both primary (e.g. micro-datasets) and secondary (databases, reports etc.) sources of information and employing both quantitative (e.g. construction of indicators) and qualitative (e.g. desk research) techniques. The outcomes of this objective could be presented in the form of a database/tables of indicators accompanied with possible visualisations as well as reports summarising key findings for specific dimensions of interest (e.g. country/sector/occupation reports). The primary focus of this objective is to produce labour market information (LMI), however ensuring cross-country comparability as well as comparisons across occupations, sectors and levels/types of skills. The Contractor will have to suggest a list of relevant indicators/indexes and reports, however, should be also in a position to prepare additional ones as indicated by Cedefop.

Service (4) Transforming skills and labour market data into intelligence

The ultimate purpose of this service is to present the vast volume of available labour market information in a way that can be easily understood and be useful to the various groups of interest. This will entail further analysis of results from the second objective leading to interpretation that can be used for identifying and communicating key messages to various target groups. For that purpose it is essential for the Contractor to have a clear understanding of the interests and special characteristics of each of the stakeholders as well as the ability to appropriately interpret the relevant data and information, including suggestions for visualisations (e.g. infographics).

Service (5) Provision of regular updates on recent developments on skills and the labour market

The fourth service requires the Contractor to monitor and review developments on skills and the labour market at EU and national level and present these in a form that can be easily communicated to all interested parties. The Contractor will be requested to ensure that all relevant European as well as national sources are exploited in a systematic and consistent way that would allow capturing news related to key dimensions of skills and the labour market, such as sector, occupation, skills and country. Thus, particular emphasis should be given to the collection and systematisation of information that becomes available at frequent intervals.

Service (6) Organisation and facilitation of content-related workshops and focus groups

For the purpose of validating or consulting the work done under various services, the contractor may be asked to organise and facilitate workshops or focus groups relevant to skills analysis or the intelligence produced with representatives from key groups of interest.

⁽¹¹⁾ The inventory will be available to the selected contractor upon signature of the contract.

2.3. Description of the services to be provided

For the Framework Contract the subset of these services will comprise the objects of specific forms (Order Forms) that will be submitted to the contractor throughout its duration. These services will contribute to fulfilling the objectives outlined above.

2.3.1 Profiling the needs and characteristics of key stakeholders

Labour market information and intelligence are useful for a number of stakeholders, including:

- **Policy making** institutions at various levels (i.e. EU, national, regional);
- **Information, advice and guidance (IAG) agencies and practitioners**, including both public and private employment services, career counselling agencies providing career guidance to adults, as well as practitioners providing education and career guidance to young people in education;
- **Trade unions** and/or **employers' associations**;
- **Education and training institutions** (providers) at regional, national and international level;
- **Experts**, including specialists who work in universities, research centres, policy making organisations as well as private consultants;
- **EU citizens** who can be divided into two distinctive groups: job seekers and individuals who are interested in making plans about their studies (i.e. career planners) or professional development, etc.

Thus, since labour market information and intelligence aims to cover the needs of the above groups it will be essential that the contractor identifies their main characteristics and interests in terms of data and labour market intelligence, and acknowledges the expected challenges in meeting their needs. To complement this work, a users' needs analysis (focusing on the features that the EU Skills Panorama site should offer) will be done also as part of the technical development of a dynamic site and is therefore not part of this contract. However, the contractor will be asked to verify and complement the user's needs analysis with the content and analytical interests of the groups. This step, and interaction between both contractors, is essential for the successful preparation of LMI and intelligence.

The work of the contractor will be organised in different assignments and may cover only some of the stakeholders listed above. The Contractor will be expected to conduct desk research as well as primary research (e.g. limited number of interviews) involving representatives from key stakeholders. Cedefop's team has internally prepared draft user's fiches identifying the above characteristics and these can be made available upon request. However, it will be the Contractor's responsibility to elaborate further and finalise this work with the view of providing content scheme or model for each selected group. The outcome of this work will be validated through representatives from each group (e.g. the Contractor may organise stakeholders' workshop aiming at the validation of the designed profile).

2.3.2 Maintaining the inventory of sources, datasets and indicators

The Contractor will be required to review, maintain and update the inventory of descriptive information on sources, datasets and indicators on labour market situation and developments in EU Member States. The level of analysis should ideally cover the country, sector, occupation, and skill dimensions. The Contractor should utilise timely, relevant and regularly updated information available from European and international sources, such as the EU LFS, PIAAC and PISA as well as national datasets. A separate inventory will list all relevant qualitative sources of information. Both initial inventories are currently being developed in the context of the EU Skills Panorama.

The inventory of European, international and national datasets and indicators provides full description of all relevant datasets (both macro ⁽¹²⁾ and micro-datasets ⁽¹³⁾) and indicators. The

⁽¹²⁾ Publicly available data, including ready-made indicators.

contractor will be requested **not only to focus on data and indicators which are already available** but to also review a number of available datasets (i.e. go through the documentation) for research purposes (i.e. **micro-datasets**) and propose the use of additional ones (as suggested by recent literature) or the construction of new indicators that would be relevant to skills and the labour market. In the case of proposed indicators, a full description of how these can be retrospectively constructed using the original dataset should be provided. The inventory also contains available information about datasets produced at national level and offers a brief description of as well as provides permanent links to the source.

The inventory of qualitative sources contains relevant sources/documents at both EU and national level; provides description of the information and offers guidance on how it can be used. In case of documents/reports based on a concrete dataset, the information should include permanent links to relevant datasets (and link within the inventory).

2.3.3 Engaging in data handling and analysis

Data exploitation and analysis will be one of the core services to be provided during the course of the Framework Service Contract. It should include analysis of data, statistics and results about economic and labour market conditions; education, qualifications, training and skills; current and future demand and supply of labour and jobs; skills requirements in jobs; and vacancies and recruitment.

The following detailed tasks and activities are foreseen:

- Handling, exploitation and analysis of relevant micro and macro datasets, including creation and maintenance of scripts for possible application on future updates or waves of data (where applicable). This may include also unique datasets which are not publicly available (e.g. Cedefop survey and other data relevant to skills analysis).
- Development, construction, testing and validation of new indicators as well as those based on the existing inventory in agreement with Cedefop. Where possible, the indicators should be disaggregated according to the main dimensions of interest (e.g. country/sector/occupation/level of education).
- Provision of further analysis and handling of the datasets in order to produce more complex (composite) indicators and indexes or conduct advanced descriptive statistical analysis.
- Delivering indicators in a form of tables/spreadsheets/graphs but also providing suggestions for the best possible visualisation.

2.3.4 Provision of regular updates on recent developments on skills and related labour market issues

Various skills related reports are being frequently published throughout European Member States. Monitoring and harvesting the potential of these reports will be one of the core services of the contract. This will require mobilising a network of national contacts/experts to collect data and information at the national level. The following detailed tasks and activities are foreseen:

- Systematic reviews of skills and labour market developments and provision of regular updates for the various dimensions of interest (sector, occupation, skills) at EU and national level.
- Providing secondary (meta-) analysis of available data and information at European and national level by reviewing secondary sources (databases, documents, etc.) to enhance the data analysis undertaken in point 2.3.3.
- Collecting and cataloguing relevant contacts at national level regarding relevant institutions involved in skills anticipation and labour market information provision.
- Providing further skills and labour market analysis where necessary based on Cedefop needs.

⁽¹³⁾ Micro-data available to research entities on the basis of which indicators can be built.

2.3.5 Transforming skills and labour market data and information into intelligence

The above mentioned services will provide qualitative as well as quantitative labour market data and information in various forms (facts, briefs, reports, tables, spreadsheets, graphs or charts). These will also cover issues related to the past, present or future trends in the labour market and the factors that influence it. However, to be useful to the various target groups, such data and information will have to be adequately delivered and adapted to users' needs (providing informed analysis, interpretation, conclusions and possibly recommendations). The following detailed tasks and activities are foreseen:

- Proposing ways of transforming the skills and labour market information into intelligence focusing on users' needs and interests. The intelligence should take into account the overall context and make use of various sources, where possible, to ensure the validity of the intelligence provided (i.e. triangulation of the results).
- Preparation of reports of varying length based on: (1) the analysis of secondary data and information regarding skills and labour market developments or (2) combining the original data analysis (point 2.3.3.) with secondary data and information. These could range from very short to extensive reports based on Cedefop needs.
- Regular provision of intelligence in the form of short summaries, indicators or tools, etc., including proposals for appropriate visualisations (use of infographics, etc.).
- Providing the outcomes of comprehensive analyses on selected topics and issues of interest in a concise format (e.g. for policy makers).
- Validating the intelligence produced with representatives from key groups of interest.

2.3.6 Organisation and facilitation of content-related workshops and focus groups

The contractor may be asked to organise and facilitate workshops or focus groups relevant to skills analysis or for validating the intelligence produced with representatives from key groups of interest. The following tasks and activities are foreseen:

- Identify relevant stakeholders and participants to be invited.
- Preparation of all background materials for the workshop and facilitating the discussion.
- Writing up the summary and outcomes of the workshop.

2.4. Deliverables

Individual deliverables will be specified within each Order Form and can be in form of reports or direct feeds into the EU Skills Panorama. Deliverables are expected to be of high quality and fully meet the expectations of Cedefop (as shall be described in the Order Form(s)).

The Contractor shall submit all deliverables in English, primarily in electronic format. Figures and tables should be delivered separately in Excel, in Word or in other agreed format, as appropriate. Excel charts should include the data used to be able to reproduce the charts. The electronic files must correspond fully to the hard-copy version (if applicable). The scripts (e.g. STATA log and do-files) used to run the analysis will be delivered to Cedefop to ensure the transparency and replicability of results. Lay-out and format of the text – in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (Annex H).

The Contractor shall ensure that all the deliverables as submitted to Cedefop have been subject to professional proof-reading and editing in English (i.e. by the copy editor).

2.5. Task assignment procedures

Cedefop and the contractor will communicate in English. All tasks will be performed on a “fixed price request” basis, i.e. effort estimation (quote) and its approval by Cedefop will precede the issuance of Order Forms and execution of the services.

The following task assignment procedure will apply, before the signature of each Order Form:

- 1) A request for quotation is sent by Cedefop to the contractor, including the task description and the related technical specifications;
- 2) If necessary, clarifications may be requested by the contractor through phone conferences or emails. Cedefop will provide clarifications accordingly;
- 3) Within 10 working days, the contractor shall provide an estimate of the work-days the task will require, as well as the delivery date; quotes should take into account project management, documentation, follow-up and quality control of the deliverables;
- 4) If necessary, Cedefop will discuss the offer with the contractor (see step 3 above) until an agreement for the undertaking of the task or part of the task is reached;
- 5) An Order Form will be prepared and sent to the contractor by the Cedefop’s Procurement Service for signature;
- 6) Upon signature by both parties, the Order Form enters into force and the contractor starts executing the task in view of providing the specified deliverable(s) within the agreed timetable.

The frequency and format of project updates will be agreed at the kick-off meeting.

2.6. Meetings and travel expenses

The contractor will be required to attend meetings at Cedefop in GR-Thessaloniki.

One Kick-off meeting will take place at Cedefop premises in Thessaloniki upon signature of the first order form (est. December 2014 or January 2015). In addition, it is foreseen to have 2 meetings with Cedefop per year where 2 persons of the research team/consortium will attend, i.e. 9 meetings in total (18 travels).

Meetings dates, frequency and number of representatives will be decided upon common agreement between Cedefop and the contractor.

Meetings expenses (i.e. travel and accommodation) will be paid to the contractor on the basis of the contractor’s Financial Offer (see point 5.4, price schedule table, section 2)).

Any extra travel expenses, 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 II of the draft contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

Participation to this tender procedure 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 j) 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 **300,000 €**.

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

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last three financial years concerning 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 subcontractors (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 subcontractor) 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.

Requirements for Technical and professional capacity:

- The tenderer must have **minimum of five (5) years' experience in the field of comparative European labour market and skill related data, research and policy analysis** and the **capacity** to analyse socio-economic data at national and European level;
- Previous **professional experience working with Eurostat micro-data** and/or institutional eligibility to access Eurostat micro-data;
- (Access to) a **network of country experts** with the capacity to collect, analyse and report on skills and labour market developments in their country;
- The Tenderer's **proposed team** must have the profiles, knowledge and experience relevant to the subject of the contract for its successful implementation. In particular, the following profiles and requirements are mandatory:

Team Leader (1 CV):

- **Minimum five (5) years** of individual experience in European research project management;
- **Minimum five (5) years** of individual professional research experience in total, in two or more of the following fields:
 - Comparative research on skills, labour market and/or employment issues;
 - Construction of labour market/education indicators;
 - Secondary data analysis using qualitative techniques;
 - Use of labour market/education data to create labour market intelligence;

- **Minimum five (5) years** of individual professional research experience in handling, processing and engaging in data analysis of international, European or national socioeconomic data sources;
- Linguistic ability to communicate and draft to a **high standard in English** (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)⁽¹⁴⁾”).

Senior researcher (at least 4 CVs):

- **Minimum four (4) years** of individual professional research experience in total, in one or more of the following fields (however all fields should be covered by the set of proposed CVs):
 - o Comparative research on skills, labour market and/or employment issues;
 - o Construction of labour market/education indicators;
 - o Secondary data analysis using qualitative techniques;
 - o Use of labour market/education data to create labour market intelligence;
- **Minimum four (4) years** of individual professional research experience in handling, processing and engaging in data analysis of international, European or national socioeconomic data sources;
- Linguistic ability to communicate and draft to a **high standard in English** (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Researcher (at least 4 CVs):

- **Minimum two (2) years** of individual professional experience in total, in one or more of the following fields (however all fields should be preferably covered by the set of proposed CVs):
 - o Comparative research on skills, labour market and/or employment issues;
 - o Construction of labour market/education indicators;
 - o Secondary data analysis using qualitative techniques;
 - o Use of labour market/education data to create labour market intelligence;
- Linguistic ability to communicate and draft to a **high standard in English** (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Data handling expert (at least 2 CVs):

- **Minimum three (3) years** of individual professional experience in total in handling and processing (cleaning and harmonisation) of international, European or national socioeconomic data sources (preferably on skills, labour market and/or employment);
- Linguistic ability to communicate and draft to a **high standard in English** (Level B2 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Copy editor (at least 1 CV):

- **Minimum three (3) years** of individual professional experience in gathering information and writing for various target groups, including policy makers, using web/new media communication;
- Linguistic ability to communicate and draft to a **high standard in English** (Level C2 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Designer (at least 1 CV):

- **Minimum two (2) years** of individual professional experience in design and data visualization (e.g. infographics);

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

- Linguistic ability to communicate and draft to a **high standard in English** (Level B2 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Proofs / Evidences of Technical and professional capacity

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

- **A brief company profile** with short presentation of the Tenderer highlighting relevant experience in comparative European data and policy analysis, previous professional experience working with Eurostat micro-data, capacity to analyse socio-economic data at national and European levels (please fill-in Questionnaire 4 of Annex G);
- Copy of an **existing contract signed with Eurostat for access to Eurostat micro-data**, or statement of eligibility to be checked against the legal entity form attached in annex D as filled in by the tenderer, in line with Eurostat restrictions on access to micro-data ⁽¹⁵⁾;
- A list of at **least 3 contracts** performed in the past five (5) years (*concluded by the deadline of submission of offers*) describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer (please fill-in Annex G, Questionnaire 3);
- **The detailed CVs of the team members** (in Europass format ⁽¹⁶⁾ or similar) who will be proposed to implement the contract (as specified above). The tenderer must provide at least the number of distinct CVs required for each profile. CVs of the proposed team members should clearly indicate and describe which work experiences are relevant for the fulfilment of the contract, and clearly present the linguistic abilities, in particular in English ⁽¹⁷⁾ (please fill-in Annex G, Questionnaire 5);
- **List of country experts with affiliations** to be mobilised for collecting, analysing and reporting on skills and labour market developments in their country.

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 (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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).

⁽¹⁵⁾ <http://epp.eurostat.ec.europa.eu/portal/page/portal/microdata/introduction>

⁽¹⁶⁾ <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae>

⁽¹⁷⁾ According to the levels of the Council of Europe: Common European Framework of Reference for Languages (CEF): <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 35 countries, namely: the 28 EU Member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (FYROM, Albania Serbia and Montenegro).

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

A 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.

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.

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:

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

Whereby:

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

TFS = Total Financial Score of the tender (as per points 5.3 and 5.4);

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

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

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each of the four award (evaluation) criteria and in total a minimum of **70** out of 100 points (TQV) in the technical evaluation – see below).

5.1. Technical evaluation

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

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

- **Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (10 points)**
 - a) The level of understanding of concepts, literature and research issues related to skills analysis and labour market information at national and European level (5 points).
 - b) The level of understanding of challenges linked to transfer of the research findings on skills as well as labour market data and information into policy and practice (5 points).
- **Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (30 points)**
 - a) The level of understanding of the conceptual and methodological challenges implied in the assignment, linked in particular to data and information availability at national and European level (10 points).

- b) The level of understanding of research challenges to produce reliable and valid labour market and skills information and intelligence, i.e. methodology for data analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (10 points).
- c) Quality and appropriateness of the approaches suggested for carrying out the individual services outlined in the technical specifications in point 2.3 (10 points).

➤ **Award criterion 3 – Preparation of sample products according to the Annex K (45 points)**

- a) Quality and appropriateness of the methods and approaches suggested and used for carrying out tasks as specified in the Annex K (10 points).
- b) Suitability, relevance and clarity of the products to the specified target group in terms of information presented and its format (25 points).
- c) Efficiency of the process used for the development of the products, including the number of person days and profiles dedicated to the production of the sample products (10 points).

➤ **Award criterion 4 – The organisation and management arrangements (15 points)**

- a) Allocation of tasks and responsibilities of the proposed experts as well as the capacity to mobilise the required expertise, including a network of country experts (10 points)
- b) Capacity to perform the tasks as defined in the terms of reference and ensuring timely delivery of high quality outputs, including risk management and quality control measures (5 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 of the four award (evaluation) criteria, and/or
- obtain an overall total score (Total Quality value) of less than the total **70** (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).

The tender(s) who meet(s) all (and each) minimum characteristics / requirements will be considered technically compliant.

All non-compliant tenders will be eliminated at the stage of technical evaluation and the contract will be awarded to the tenderer with the least expensive, compliant tender.

5.2. Technical proposal

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

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference 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.

Tenderers are requested to include their technical proposal (envelope B) in one original and three hard copies and in a form of a read access secured CD.

The content of the technical proposal in the hard copies and the one in the CD must be identical.

In case of discrepancies between the hard copies and the CD, the hard copies shall take precedence.

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

For award criterion 1

- Discussion of the subject demonstrating in-depth knowledge and understanding of the objectives, concepts, relevant literature and research issues related to skills analysis, anticipation and matching as well as labour market information at national and European level (max. 5 pages).
- In-depth discussion of the potential challenges linked to transfer of the research findings on skills as well as labour market data and information into intelligence for policy and practice addressing the various target groups of the project (max. 5 pages).

For award criterion 2

- Prior assessment of the research challenges - conceptual and methodological – implied by the assignment with a particular focus on delivery of reliable and valid labour market and skills information and intelligence, i.e. methodology for data analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (max. 10 pages).
- Description and explanation of the rationales for proposing specific approach and methods concerning each of the individual services as outlined in section 2.3 (max. 3 pages per service).

For award criterion 3

- Tenderers are requested to follow the instructions in Annex K and to provide the respective deliverables requested therein.

For award criterion 4

- Description of the management approach, including explanation of the roles and responsibilities of the team members.
- Description of quality control measures and tracking system to be put in place to allow Cedefop to monitor the progress of work (e.g. online tracking system).
- Preliminary assessment of likely difficulties (risk assessment) in carrying out the work, proposed actions required to meet these.

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 70 points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each of the four award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **Weighted Price per profile and travel costs** offered (**Financial Proposal**) in the Price schedule table (see point 5.4).

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

$$\text{Individual Financial Score} = (\text{Cheapest Financial Proposal for the category} / \text{Financial Proposal for the category of the tender considered}) * Z$$

where Z is the maximum number of points allocated for each category (see the table below).

Profile	Max points = Z
Category 1: Team leader	20
Category 2: Senior Researcher	20
Category 3: Researcher	15
Category 4: Data handling expert	15
Category 5: Copy editor	10
Category 6: Designer/Visualization expert	10
Category 7: Administrative staff	5
Category 8: Total travel costs	5
Total	100

$$\text{Total Financial Score (TFS)} = \sum (\text{Individual Financial Scores})$$

Total Financial Score (TFS) will be calculated as a sum of all individual financial scores per category (points reached per category). The tender offering the lowest price for each of the costs categories will score the maximum no. of points.

5.3.1. Evaluation of abnormally low prices

If any tender's price appears to be abnormally low in relation to the *services* offered, and in order to check if the tender can be considered valid, the evaluation committee will, before it may reject

this tender, send a request for clarifications to ask for explanations on the components of the tender which it considers relevant to the presumed abnormally low price and shall verify those constituent elements taking account of the explanations received. If in that relation the tenderer cannot explain his price on the basis of the economy of the services or supplies offered, or the method used, or the technical solution chosen, or the exceptionally favourable conditions available to the tenderer, the tender will be rejected.

A price will be considered abnormally low if the financial offer of any tenderer is lower with more than the acceptable margin of deviation from the average price of the other technically acceptable offers (please note that definition of which offers are technically acceptable/ compliant is given in points **5**, **5.1** and **5.3** above). The actual deviation will be calculated as % as follows:

The difference between the average price of the other technically acceptable offers and the value of the presumably abnormally low financial offer will be divided by the average price of the other technically acceptable offers.

The acceptable margin of deviation is set to **40%**.

The approach of the Evaluation Committee to identify and eliminate abnormally low tenders will be the following:

- a) apply the acceptable margin of deviation from the average price of the other technically acceptable offers and set aside the offers that go beyond it;
- b) check if specific notes or specific items included in the offer justify to some extent the deviation; if not, or if inadequate, send relevant request for explanation(s) to the tenderer concerned;
- c) decide on the acceptability of the offer on the basis of the notes in the tender and/or the clarification reply received.

5.3.2. Financially unacceptable tenders

In the context of financial evaluation, the Evaluation Committee could find that tenders are unacceptable because the price is abnormally low (see point 5.3.1).

Such tenders will have to be rejected by the Evaluation Committee, independently of their quality value as determined in the preceding (technical) evaluation stage.

5.4. Financial Proposal

The financial offer must be clear and in compliance with the Terms of Reference.

The Financial Proposal should indicate the price per category and for planned meetings in order to carry out all the activities indicated in the Terms of reference. The tenderers must fill-in the following Price schedule table and present a detailed breakdown of the price offered.

The Financial Proposal should take into account the estimate of value of the Framework Contract (see point 1.5). All services that shall be procured should be included.

Price schedule table

1)	Staff category		Unit price (EUR) per person-day	
	Category 1: Team leader			
	Category 2: Senior Researcher			
	Category 3: Researcher			
	Category 4: Data handling expert			
	Category 5: Copy editor			
	Category 6: Designer/Visualization expert			
	Category 7: Administrative staff			
2)	Attending meetings at Cedefop - see point 2.6	Number of meetings * 2 persons	Price (EUR) per meeting/person	Amount (EUR) for all meetings
		18		

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

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 – 5 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
- a read access secured CD containing the submitted in paper form technical proposal.

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 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.

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- 5

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

ANNEX H

CEDEFOP STYLE MANUAL/REFERENCING GUIDE

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

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)

ANNEX K

Instructions for exercise (Award criterion 3)

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