

FINANCE AND PROCUREMENT

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Thessaloniki, 20 July 2016

OPEN INVITATION TO TENDER

Provision of Stakeholder feedback services for Cedefop's performance measurement system
AO/DIR/GKO/Stakeholder_feedback_services_PMS/010/16

REFERENCE: *Contract notice – 2016/S 138-249727 of 20/07/2016*

Tender Specifications

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),
 Attention of Procurement Service
 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),
Attention of Procurement Service
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/DIR/GKO/Stakeholder_feedback_services_PMS/010/16 ‘Provision of Stakeholder feedback services for Cedefop’s performance measurement system 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 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 so that there can be no doubt as to words and figures.
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. Therefore, 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).
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 maximum two representatives. The names of the persons 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 three working days prior to the opening session. Failing that, Cedefop reserves the right to refuse access to its premises.
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.

Before requesting any additional information, the tenderers are kindly requested to visit the FAQ page on Cedefop website:

<http://www.cedefop.europa.eu/en/about-cedefop/faqs/procurement-procedures>

- 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/about-cedefop/public-procurement>.)

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)	01/09/2016	N/A
Last date on which clarifications are issued by Cedefop	05/09/2016	N/A
Deadline for submission of tenders (hand delivered)	12/09/2016	17.00h

Deadline for submission of tenders by post / courier	12/09/2016	N/A
Validity of the tenders	12/03/2017	N/A
Tender opening session	23/09/2016	11.00h
Estimated contract signature date	End of November 2016	

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 for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.
11. Up to the point of signature, the contracting authority (i.e. Cedefop) 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 may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on
http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE).

¹ Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002 (OJ L 298 of 26.10.2012, p. 1) as amended.

15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.
16. You will be informed of the outcome of this procurement procedure by e-mail only. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Yours sincerely,

Isabelle Thomas-Kollias
Acting Head of Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DIR/GKO/Stakeholder_feedback_services_PMS/010/16

**Provision of Stakeholder feedback services for Cedefop's
performance measurement system**

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

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

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽²⁾ 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 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. 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.

⁽²⁾ 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 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.

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 a Financial Proposal 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 stakeholder feedback services for Cedefop's performance measurement system

b) Short description of content of this contract: The purpose of the contract is to support Cedefop to:

- better understand to which extent the quality and relevance of Cedefop's work and expertise are used and valued by its stakeholders
- assess the quality and relevance of Cedefop's consultation with its key stakeholders
- gain more insight into how Cedefop's Governing Board members are exercising their supervisory function

with a view to improve its performance in fulfilling its vision and reaching its multi-annual objectives.

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

The tasks will be completed both in the Contractor's premises and in Cedefop's premises, 123 Europe str., Pylea, Thessaloniki.

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 **85,000 EUR (without VAT)** over a 3 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** year and will be automatically renewed up to **two (2)** times, each for an additional period of one (1) year, covering a total acquisition period of three (3) years (1+1+1).

1.7. Main terms of financing and payment

Payments will be made upon completion of specific tasks described in each order form and after the approval of the final report by Cedefop Project Manager, within **60** days of submission of invoices and at the conditions set out in the draft contract.

2. TERMS OF REFERENCE

2.1. Background information

The following sections describe the context within which the requested services will operate. They describe Cedefop's existing performance measurement system (PMS) and how it is used to assess the achievement of the Agency's vision, values and multi annual objectives. They refer to the new requirements for Cedefop's PMS that i) resulted from an internal review that was concluded in 2015 (see 2.1.1), ii) were introduced by the European Commission (see 2.1.2) and iii) were proposed following Cedefop's last external evaluation (see 2.1.3). The stakeholder feedback services that will satisfy the new requirements should be complementary, reinforce each other and be part of a reviewed integrated Cedefop performance measurement system.

2.1.1 Cedefop Performance Measurement System

Since 2009, Cedefop has a performance measurement system (PMS)³ which provides understanding of the Agency's achievements, relevance and efficiency. The PMS supports transparent reporting to stakeholders and promotes a culture of continuous improvement among its staff. Cedefop's performance measurement framework concentrates on three types of results:

- the organisation's impact in helping develop European vocational education and training (VET) policy;
- the outcomes or achievements of Cedefop's activities;
- its outputs.

These types of results are measured in different ways. While Cedefop has direct control on its outputs, outcomes and impact are less tangible and depend on several external factors.

Cedefop's desired impact is stirred by its vision to '*Strengthen European cooperation in vocational education and training (VET) and support the European Commission, Member States and social partners in designing and implementing policies for a world-class and inclusive VET that provide skills and qualifications relevant for working lives and the labour market*'. This impact can be realised in the medium to long term and is due to situational changes in European VET and related policy achieved through the direct and indirect use of Cedefop's work by policy makers.

An approach with systematic external evaluations (⁴) which are carried out every 5 years and systematic analysis of PMS outcome indicators (⁵) try to capture the long-term impact of Cedefop. As impact is linked to a combination of projects or activities, frequently evidence of impact can only be attached to Cedefop at organisational level.

Outcomes of Cedefop's activities are defined as observable results that Cedefop's work is having an effect among its key external stakeholders. They focus on the degree to which the organisation provides evidence to inform policies and their implementation, generates new knowledge or acts as a knowledge broker on VET issues for countries and stakeholders. They

³ A description of Cedefop PMS can be found in annex IX of the 2016 work programme available at <http://www.cedefop.europa.eu/en/publications-and-resources/publications/4143>

⁴ The systematic external evaluations is an institutional requirement mentioned in Cedefop's founding regulation and is carried out by the European Commission

⁵ See a selection of performance indicators in Annex II of 2015 annual report at <http://www.cedefop.europa.eu/en/publications-and-resources/publications/4145>

are designed to support Cedefop's values and multiannual objectives and become visible in a short to medium term perspective.

Outcomes are measured by performance indicators and provide evidence on the degree to which Cedefop's information, results, and expertise are used, are of interest and reach its target groups. Outcome indicators provide the backbone of the PMS. They measure, for example, the policy and academic citations of Cedefop's work, publication downloads, media coverage or quality of Cedefop's events.

Finally, the PMS measures and monitors output which is mostly defined at project level. Project outputs include studies, publications and conferences or workshops that are mostly produced within the operational year. Project outputs provide information on what is produced and when but not what effect it has. For this reason, performance measurement analysis gives comparatively less emphasis to reporting on outputs.

Performance measurement pays also attention to the efficiency and effectiveness of Cedefop as a well-run organisation. It provides an insight into the performance of its internal services and administration and helps ensure that they support Cedefop's objectives and priorities. These indicators measure, for example, budget execution and average time taken for core administrative business such as paying invoices, undertaking procurement or organising recruitment procedures.

A review of the system in 2015 confirmed that the PMS provides a clear analytical tool to understand Cedefop's performance and inform as much as possible management decisions on needed improvements. Additionally, the PMS review proposed that information collected through systematic analysis of regular stakeholder surveys (every 2-3 years) on the relevance, usefulness and quality of Cedefop's products and expertise ⁽⁶⁾ would usefully complement the independent external evaluations carried out by the Commission on the overall impact of Cedefop's work (see above). Moreover, stakeholder surveys could be helpful in specific cases where Cedefop wants to know more about the added value of specific activities, e.g. assess the perceptions of (national) stakeholders on Cedefop's knowledge brokering function and the support it provides to countries and social partners on VET policy development and implementation (e.g. apprenticeship country reviews, country reviews on skills anticipation and matching, development of national qualification frameworks).

Qualitative analysis is an integral part of the PMS approach, making results more meaningful and helping the organisation to understand key trends. For example, the type and range of European institutions using Cedefop research and analysis and the context of its use complement more quantitative information on the number of citations of Cedefop's work. Also, information related to coverage of Cedefop's work in the European press complements quantitative information on downloads of Cedefop publications to understand the effect of Cedefop's communication strategy in reaching its stakeholders.

2.1.2 Key Performance Indicators for the Director

In 2015 the Governing Board of Cedefop decided to set up an ad hoc Working Group on the identification of key performance indicators (KPIs) for Cedefop's Director. The requirement to set up KPIs for the Directors of EU decentralised agencies was endorsed by the European Parliament, the Council and the Commission in July 2012 as part of the Common Approach ⁽⁷⁾ on EU decentralised agencies. Following this the Commission developed guidelines on KPIs for

⁶ At present Cedefop collects customer feedback only on the quality of the conferences and events it organises and this is part of the PMS system

⁷ See http://europa.eu/agencies/documents/joint_statement_and_common_approach_2012_en.pdf

Directors of EU decentralised agencies⁸ according to which KPIs are performance-related indicators to be used as a reference to assess the Director's performance in achieving operational objectives as reflected in the annual work programme (AWP) and in managing human and financial resources allocated to the Agency.

Most of the KPIs proposed by Cedefop's ad hoc working group are already part of the existing PMS. Pending approval by its Governing Board in September 2016, the working group concluded that additional KPIs will be developed and included in Cedefop's Work programme. One of these potential qualitative indicators is the quality and relevance of Cedefop's consultation with its key stakeholders. The key stakeholders of Cedefop are represented in its Governing Board which is made up of representatives of the European Commission, Members States, and of employers and employees organisations at EU and national level (⁹). Stakeholder feedback services provided by this framework contract will be used to shape and assess this new KPI.

2.1.3 Follow up of Cedefop's 2013 external evaluation

Cedefop as an Agency of the European Union undergoes an independent external evaluation every 5 years. The last evaluation which took place in 2013¹⁰ looked at the relevance and coherence of Cedefop's work with European policies in the period 2007-2012, its effectiveness, impact and added value as well as its governance and efficiency. The findings of the external evaluation included a recommendation that the Governing Board, *conduct a self-assessment of how its members perform their supervisory responsibilities to stimulate learning and discussion on the governing model*. The European Commission's roadmap for implementing the Common Approach on EU decentralised agencies (¹¹) made similar proposals. This recommendation was incorporated into Cedefop's action plan to follow-up the evaluation. The action agreed to follow up this recommendation was to introduce a system of self-assessment to gain more insight into how Governing Board members are exercising their supervisory function and the capacity to carry out their responsibilities. The Governing board's responsibilities are outlined in Cedefop's founding regulation (¹²) and can be found in the annex L.

2.2. Objectives, purpose and expected results

2.2.1 Overall objective

The overall objective of this framework contract is the development, analysis and reporting of stakeholder feedback services to Cedefop in line with its annual work programme and programming document 2017-2020. The contractor is expected to provide timely and high quality services delivered by experienced and qualified experts in this type of services.

2.2.2 Purpose

The purpose of the contract is to support Cedefop to:

⁸ See <http://ec.europa.eu/transparency/regdoc/rep/10102/2015/EN/10102-2015-62-EN-F1-1.PDF>

⁹ Representatives from Norway and Iceland also participate in the Governing Board as observers.

¹⁰ The final report is available at http://ec.europa.eu/dgs/education_culture/more_info/evaluations/docs/education/cedefop2013_en.pdf

(¹¹) The Roadmap states that, *the Common Approach will aim to clarify that management boards are expected to play a supervisory role to counterbalance the powers of directors and invited Member States to pay greater attention to the management skills of persons appointed to agencies boards and to regularly review the adequacy of staff/resources assigned*. See

[www.europa.eu/agencies/documents/2012-12-](http://www.europa.eu/agencies/documents/2012-12-18_roadmap_on_the_follow_up_to_the_common_approach_on_eu_decentralised_agencies_en.pdf)

[18_roadmap_on_the_follow_up_to_the_common_approach_on_eu_decentralised_agencies_en.pdf](http://www.europa.eu/agencies/documents/2012-12-18_roadmap_on_the_follow_up_to_the_common_approach_on_eu_decentralised_agencies_en.pdf)

¹² http://www.cedefop.europa.eu/files/Consolidated_version_Founding_Regulation_EN_01975R0337-20041221-en.pdf

- better understand to which extent the quality and relevance of Cedefop's work and expertise are used and valued by its stakeholders
- assess the quality and relevance of Cedefop's consultation with its key stakeholders
- gain more insight into how Cedefop's Governing Board members are exercising their supervisory function

with a view to improve its performance in fulfilling its vision and reaching its multi-annual objectives.

2.2.3 Tasks to be achieved by the Contractor

The contractor is expected to carry out the following tasks, in close collaboration with and under the close supervision of Cedefop:

- Develop the appropriate indicators (quantitative and qualitative) and link them conceptually to Cedefop's PMS in response to the results of the internal review of the PMS, the requirements of the external evaluation and the requirements for KPIs for Director as these are described in point 2.1. These indicators will bring qualitative insights to the current system and will help to complement measurement at organisational level on the organisation's impact in helping to develop European VET policy. This conceptual work should define indicators and the appropriate methodologies and tools that are complementary to each other and are part of an integrated Cedefop performance measurement system.
- Develop the appropriate tools, to analyse and report on qualitative insights into how Cedefop outputs, activities and expertise are perceived by its stakeholders and how they are used. This insight will complement the quantitative data of the Cedefop PMS. The qualitative tools used under the framework contract will be mainly targeted customer feedback surveys addressing the categories of Cedefop's stakeholders from Cedefop's contact database. It is expected that this exercise will take place every 2 or 3 years. The first deployment will depend on the timing of the next Cedefop's external evaluation⁽¹³⁾ in order to avoid overlapping and will most probably take place in the second quarter 2019.
- Develop the appropriate tools to assess, analyse and report on Cedefop's consultation with its key stakeholders when developing and implementing its work programme. This refers to Cedefop's communication and information with its Governing Board and Bureau members (e.g. are they regularly consulted, through which channels, do they receive the right and timely information, are their directions and proposals taken into account etc.). The qualitative tools used under this framework contract will be mainly customer satisfaction surveys addressed to Governing Board members combined with interviews and/or focus groups. The review of Cedefop's consultation process with its key stakeholders will be part of the regular annual review activities of Cedefop as part of the Centre's PMS. This exercise is expected to take place for the first time on the second half of 2017.
- Develop the appropriate self-assessment tools to assess, analyse and report to which extent Cedefop's Governing Board exercises its supervisory function (e.g. planning of annual work programmes and programming document, annual reporting, annual budget, etc.). The qualitative tools used under this framework contract will be mainly customer satisfaction surveys addressed to Governing Board members combined with interviews and/or focus groups. It is expected to hold this exercise every 3 years (subject to agreement of Cedefop Governing Board). This will also include the identification of indicators to measure performance in this respect in between the subsequent assessment

⁽¹³⁾ The next independent external evaluation for Cedefop is expected to take place end 2017-beginning 2018

exercises. This exercise should be developed in 2016 and carried out in the second half of 2017.

It should be noted that although exercises iii and iv have different purposes, in some instances and depending on the timeframe they might be combined to produce the expected results and reduce the 'survey fatigue' to the respondents.

2.2.4 Methods and tools

The following tools are envisaged to be used by the contractor:

Development and deployment of targeted customer feedback surveys

Targeted customer satisfaction survey can be used to obtain feedback on satisfaction with Cedefop's publications and other feedback dimensions. Questions may be organised by thematic areas (e.g. skills, apprenticeships, etc.) collecting feedback on the quality of Cedefop's work, how relevant is it, how does it compare to the work of other institutions, whether it is used and for which purpose, etc. Surveys should be targeted to collecting feedback from specific Cedefop users on specific products in line with Cedefop's communication strategy (e.g. the satisfaction of policy-makers on Cedefop briefing notes which is the main publication type used to reach policy makers). It will be the first one to be carried out by Cedefop and it will therefore serve to establish the baseline for any indicators to measure customer satisfaction. It is important that questions are formulated in a way that allows them to be repeated in future surveys as it will be carried out every two or three years. Survey deployment may be envisaged through an online questionnaire with a link to this provided in an email to the target groups (and/or in Cedefop's newsletter). It is foreseen that potential respondents will be identified from Cedefop's Contacts database and that the survey may have up to 60 questions. The successful tenderer should provide the IT tool to carry out the surveys and will be responsible for the monitoring and provision of regular and necessary maintenance checks to avoid disruption in the availability of the surveys.

Targeted surveys may also be used to obtain feedback from Governing Board and Bureau members on the quality of Cedefop's consultation with its key stakeholders and the extent to which the GB members exercise their supervisory role. As described in section 2.2.3 above, this survey may be used for exercises iii and iv. It will be the first time that Cedefop will be carrying out such exercises and therefore the contractor's work will serve to establish the baseline for any indicators to measure performance in this regard and for similar surveys to be carried in the future. Similar questionnaires addressed to GB members were used in the past in the framework of Cedefop's external evaluations. The assessment of Cedefop's consultation process will provide insight on how GB members perceive Cedefop's consultation initiatives, to which extent they are satisfied with their organisation and how their impact is perceived by the bodies they represent. The assessment of Cedefop's Governing Board role to exercise their supervisory function will focus on the planning of annual work programmes and programming document, the Centre's annual reporting, the follow up on external evaluations and audit recommendations, budget, accounts, etc. Survey deployment may happen through an online questionnaire or by using feedback questionnaires after the GB/Bureau meetings. It is foreseen that the survey will be addressed to all members of Cedefop GB and Bureau and it may have up to 20 questions.

Development and running of interviews and focus groups

Interviews and focus groups may be used in order to collect qualitative information from a number of selected respondents. Direct interaction with respondents will facilitate the clarification of ambiguous or incomplete answers to the questionnaires thus improving the quality of the information collected. For exercises iii and iv interviews and focus groups may take place either at the premises of Cedefop or in Brussels during the Governing Board meeting (once a year in Thessaloniki) or during the Bureau meetings (3 times a year). Interviews and focus groups will be developed, organised, facilitated and reported on by the contractor under close supervision from Cedefop.

2.2.5 Analysis and reporting of results

Analysis and reporting is required for all requested services. This includes analysis, synthesis and detailed descriptive reports on findings and field work, and may include on-request analytical and/or synthesis reports. Analysis of statistical data and content analysis of the qualitative feedback provided by the respondents will be carried out by the contractor in close cooperation with the Cedefop project manager. The replies of the respondents will be analysed by type of Cedefop stakeholder (as defined in Cedefop communication strategy ¹⁴) and where appropriate find relevant correlations. To support and enrich the analysis of the information provided by the respondents, the contractor will be asked to identify relationships with other indicators collected by Cedefop PMS for example on the downloads of Cedefop publications, the press clippings of Cedefop's work in the media and the citations of Cedefop work in EU and international policy documents or academic literature. The contractor should also provide to Cedefop a set of recommendations to address any issues that require attention.

The expected deliverables will be defined in the specific order forms which will be concluded under the framework contract. Deliverables will be submitted in writing and in English and include inception and final reports, which will be subject to professional proof-reading and editing in English. It is expected that some of the final deliverables will be made available to Cedefop's management and Governing Board, therefore final written report deliverables will be required to be completed in compliance with Cedefop style manual (See Annex H).

Contractors may be requested to present key findings of the work in English to Cedefop's management, and/or to facilitate workshops consisting of diversely composed stakeholder groups in English. Very good oral command of English will be expected for these delivery formats.

2.2.6 Meeting and Travel expenses

The Contractor will be requested to attend the following meetings at Cedefop:

- One kick-off meeting with the project managers responsible a few weeks after the signature of the first order form:
- Three foreseen meetings to present key findings of the work ;

For evaluation purposes, the costs incurred, including travel & accommodation related to one Cedefop's meeting as described above have to be included in the financial offer (see point 5.4 and Annex K).

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).

¹⁴ Cedefop's communication strategy describes the different types of Cedefop stakeholders and the communication channels Cedefop is using in order to reach them and will be made available to the successful tenderer.

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation to this tender procedure is only open to tenderers who are in a position to subscribe in full to the “**Declaration on honour on exclusion criteria and selection criteria**”, given in Annex C. 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 declaration on honour found in Annex C duly signed and dated.

3.1. Exclusion Criteria

The purpose of the exclusion criteria is to determine whether an economic operator / tenderer is allowed to participate in the procurement procedure or to be awarded the contract.

The exclusion criteria will be assessed in relation to each company individually. In the event of recommendation for contract award, evidence will be requested as described in Annex C (last page).

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.

Requirement:

- 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 **50,000 €**.

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

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors. *For tenderers or sub-contractors (identified as per any of the two bullet-points in paragraph 4 of Art. 4.2 below) who are natural persons / freelancers, a tax declaration and tax clearance statement for the last three financial years will be requested.*

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, they 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:

- Have performed at least **3** contracts within the past three (**3**) years (to have been concluded by the deadline of submission of offers) in developing performance measurement/management systems and in carrying out customer/user feedback or satisfaction surveys for EU, international organisations or for government, public sector organisations.
- The Tenderer's **KEY** experts, whose involvement will be instrumental for the implementation of the contract, must have the relevant to the subject of the contract profiles, knowledge and experience for the successful implementation of the contract.

In particular, the Project Leader/Senior expert must possess:

- A University degree;

- At least five (5) years' full time experience as a performance improvement expert working in the design, implementation and delivery of performance management systems;
- At least five (5) years' full time experience in project management, leading teams in carrying out customer/user feedback/ satisfaction surveys, interviews and facilitation of customer focus groups;
- At least five (5) years' full time experience in areas such as customer survey management and in the analysis and reporting of survey and focus groups results;
- Knowledge and understanding of EU or international or government/ public sector institutional contexts and settings in the area of education and training or social policies proven by involvement in 3 performance improvement projects within the last 5 years;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)").

Each Project team member/junior expert must possess:

- A University degree;
- At least two (2) years' full time experience as a performance improvement consultant working in the design, implementation and delivery of performance management systems;
- At least two (2) years' full time experience in carrying out customer/user feedback/ satisfaction surveys, interviews and facilitation of customer focus groups for EU, international organisations or for government, public sector organisations.
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)").

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 to prove the ability, technical know-how, experience and expertise needed for the provision of the required services under this call for tenders **(please fill-in Questionnaire 4 of Annex G)**;
- List of at least **3** contracts performed in the past **three (3)** years, describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer **(please fill-in Questionnaire 3 of Annex G)**;
- Detailed CVs of the KEY experts **whose involvement will be crucial for performing the contract (please fill-in Questionnaire 5 of Annex G)**. Tenderers are requested to include also a description of projects carried out during the last five years (for the project leader) or last two years (for the team members), demonstrating experience and expertise with respect to performance management and improvement and carrying out customer feedback surveys, customer panels, and customer focus groups.

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**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC which can be found in the following link: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.

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).

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 36 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 5 SAA Countries (FYROM, Albania, Serbia, Montenegro and Bosnia & Herzegovina).

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 10,01% 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 honour on exclusion criteria and selection criteria”** (Annex C) filled-in and signed by the respective Subcontractor;

2. the documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2 necessary for evaluating of the combined capacity (as a whole) of the tenderer together with his subcontractor(s);
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 alone or with the subcontractor(s) altogether fulfil the criteria.

5. AWARD OF THE CONTRACT

The evaluation of the exclusion, selection and award phase will be done in **NO** particular order. If the tenderer or the tender does not pass a phase, it will not be evaluated under the other remaining phases.

The contract shall be awarded to the tenderer submitting the best price-quality ratio method as represented by the highest Total Score (TS) out of 100.

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

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

Whereby:

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

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

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

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

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for award (evaluation) criteria 1,2,3 and 4 and in total a minimum of **60** 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 (25 points)**

The level of understanding of issues related to the development and implementation of performance management systems in EU, international or government/public sector organisations in the area of education, training or social policy.

- **Award criterion 2 – Quality and appropriateness of the methods suggested to carry out the work (40 points)**

- Appropriateness of the approach and methods proposed to develop and implement the suitable tools to carry out all tasks described in section 2.2.3 (20 points).
- Coherence of the analysis of any challenges or issues to consider when using the different tools as described in section 2.2.4 (20 points).

➤ **Award criterion 3 – Quality of work organisation and composition of team proposed (20 points)**

Coherence of the team composition and balance of skills mix of proposed team: profiles, team roles and responsibilities of all team members, including resource back-up and quality of the proposed cooperation with Cedefop in the implementation of tasks.

➤ **Award criterion 4 – Quality of management arrangements (15 points)**

Provision of relevant Quality Assurance measures for service delivery throughout the duration of the framework contract that can be applied to each specific order form.

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.

Tenderers are requested to include their technical proposal (envelope B) in one original and three hard copies.

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 the development and implementation of performance management systems in EU, international or government/public sector organisations in the area of education, training or social policy and challenges related to measuring the impact of organisations like Cedefop in helping develop European VET policy. Particular attention should be given to the analysis of the challenges related to measuring performance in an organisation like Cedefop whose objective is to having an impact in helping to develop European VET policy.

For award criterion 2

- Detailed explanation of the rationale for developing and implementing the appropriate methods and tools to carry out the tasks described in section 2.2.3 and a detailed description of the different dimensions they will assess;

- Assessment of the methodological research challenges and possible solutions in carrying out targeted customer feedback surveys, in depth interviews and focus groups to collect feedback from the different types of Cedefop stakeholders.

For award criterion 3

Detailed work plan illustrating intended organisation of the team for the completion of tasks, including explanation of the role, responsibilities and extent of the team members' participation in the contract explaining how their knowledge and related experience will contribute to good quality deliverables. Discussion on how cooperation with Cedefop will take place in particular in relation to understanding specificities of Cedefop's work, the impact it may have in helping develop and implement European VET policy and the tools that can measure best its performance, integrating them in the existing Performance Measurement System.

For award criterion 4

A clear timetable for each task and a discussion on quality assurance measures for carrying out the different tasks and for ensuring the quality and timeliness of deliverables including a preliminary risk assessment of likely difficulties in carrying out the work and 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 above 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 **60** points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for award criteria 1,2,3 and 4 will be admitted to the subsequent evaluation stages. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer TFO**) in the Price schedule table (see point 5.4 and Annex K). This Total Financial Offer TFO will be used for comparative evaluation purposes only.

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. From the 2nd year onwards, Articles I.5.2 and II.20 of the Contract shall apply (see draft Framework Contract at Annex B).
- 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.

[For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.]

[For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.]

[In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".]

5.3.1. Evaluation of abnormally low prices

If any tender's price appears to be abnormally low in relation to the *services / supplies* 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 / Financial Scenario

Tenderers should not disclose their financial offer in any part of their tender (technical proposal, cover letter) other than the sealed envelope C.

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

The Financial Proposal (Financial Scenario) should indicate the total Price (Total Financial Offer TFO) in order to carry out the activities indicated in the Terms of Reference. The tenderers must fill-in the Price schedule table in Annex K and present a detailed breakdown of the price offered.

The Financial Scenario should clearly match the Specifications (the Terms of Reference). All services that shall be procured should be included.

The **scenario** in Annex K will be used for the purpose of the **award procedure** described in point 5.3. The Total Financial Offer TFO will be calculated for evaluation purposes only.

The number of units for items 1.1 to 2.2 is provided to allow for comparability across tenders during the award procedure. However, when receiving an "Order Form" for a specific assignment, the actual division of workload per category of staff, as well as the total number of units per category may differ from the hypothetical scenario below as it will depend on the length of the questionnaire and the number of responses received in the survey.

The number of units for items 3.1 to 5 and the unit prices provided by the tenderers in their technical and financial offer will be binding for the finalisation of future order forms.

The number of focus groups is set to three to correspond to the three groups represented in the Cedefop Governing Board: the governments, the employers and the employees' organisations. The size of the focus group may be between 6 to 8 participants and all three focus groups will discuss the same set of questions.

The number of units for item 6 is provided to allow for comparability across tenders during the award procedure. When receiving an "Order Form" for a specific assignment, the actual cost will be calculated in a pro rata of the effective number of pages.

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 (not applicable for global price contract). 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 “**Declaration on honour on exclusion criteria and selection criteria**” 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 – 6 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

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

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

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

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

“Declaration on honour on exclusion criteria and selection criteria”

(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

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

Please Tick ✓ the boxes provided

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please explain the reason
		Yes	No	
Envelope 'A' must contain				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s))	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Declaration on Exclusion & Selection Criteria (including those of consortium members and subcontractors, if applicable)	3, 6.1 & Annex C	☐	☐	
- selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1 - 6 (Annex G)	3.2, 4.1; 6.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (model 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2, 6.1 & Annex J	☐	☐	
- Legal Entity Form	3.3, 6.1 & Annex D	☐	☐	
- Financial Identification Form	6.1 & Annex E	☐	☐	
- this Checklist	6.1 & Annex F	☐	☐	
Envelope 'B' must contain				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.2, 6.2	☐	☐	
Envelope 'C' must contain				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4, 6.3 & Annex K	☐	☐	

The tenderers should also ensure that:

☐	the offer is formulated in one of the official languages of the European Union.
☐	both the technical and financial proposals of the offer are signed by duly authorised agent.
☐	the offer is perfectly legible in order to rule out any ambiguity.
☐	the offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	the outer envelope bears the information mentioned in the invitation to tender point 3.

ANNEX G

Questionnaires 1 - 6

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

ANNEX H

“Cedefop Style Manual”

(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

FINANCIAL PROPOSAL

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

Annex L

Cedefop Governing Board: Responsibilities and Supervisory Functions

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