



FINANCE AND PROCUREMENT

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Thessaloniki, 11 July 2017

OPEN INVITATION TO TENDER

The potential of work-based learning in developing Upskilling Pathways for adults ***AO/DLE/LSALVA/WBLinUpskillingPathways/005/17***

REFERENCE: *Contract notice 2017/S 130-265065 of 11/07/2017*

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.

Tenderers must pay attention to the **quality of the packaging material**, especially of the inner envelope, in order to make sure that it will remain sealed until the formal opening of tenders by the Agency.

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/DLE/LSALVA/WBLinUpskillingPathways/005/17 <i>‘The potential of work-based learning in developing Upskilling Pathways for adults’</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 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)	29/08/17	N/A
Last date on which clarifications are issued by Cedefop	31/08/17	N/A
Deadline for submission of tenders (hand delivered)	07/09/2017	17h00
Deadline for submission of tenders by post / courier	07/09/2017	N/A
Validity of the tenders	06/03/2018	N/A
Tender opening session	21/09/2017	11h00
Estimated contract signature date	December 2017	

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 the Contract with the successful tenderer.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.

14. Your personal data 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).
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,

signed Michail Christidis
Head of Finance and Procurement

Attached: Tender Specifications

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.

OPEN INVITATION TO TENDER

AO/DLE/LSALVA/WBLinUpskillingPathways/005/17

***‘The potential of work-based learning in developing
Upskilling Pathways for adults’***

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.....	12
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
3. Specific information concerning participation to this tender procedure	25
3.1. Exclusion Criteria	25
3.2. Selection criteria.....	25
3.3. Legal Position.....	29
4. Additional information concerning participation to this tender procedure	30
4.1. Joint Offers/ Groupings (Consortia)	30
4.2. Subcontracting/Subcontractors	31
5. Award of the contract	33
5.1. Technical evaluation.....	33
5.2. Technical proposal	35
5.3. Financial evaluation.....	37
5.4. Financial Proposal.....	39
6. Information on presentation and content of tender.....	40
6.1. Envelope A - Supporting documents	40
6.2. Envelope B – Technical proposal	40
6.3. Envelope C – Financial proposal	40

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on honour on exclusion criteria and selection criteria
Annex D:	Legal Entity Form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Questionnaires 1 - 6
Annex H:	Cedefop Style Manual
Annex I:	Power of Attorney (Models 1 and 2)
Annex J:	Model of Letter of Intent for Subcontractor/s

Introduction to Cedefop: Europe's agency for training policy

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

About Cedefop

Cedefop is the European Union's agency for vocational education and training (VET). With its research and analyses, it supports the European Commission, EU Member States and social partners in designing and implementing VET policies, with a focus on how best to link education and employment.

European labour markets have been unsettled by globalisation, technological advances and demographic changes (ageing of the population and immigration). The economic downturn of the last decade has increased social inequality and geographical disparity. To address the economic, social, technological and environmental challenges, structural reforms both of labour markets and education and training systems are needed.

In this context, vocational education and training can help get people (back) into work and promote equality, inclusion and solidarity. VET is a pillar of lifelong learning, providing young people with an initial qualification and adults with upskilling options. VET caters both for the brightest, offering them interesting career prospects, and the most vulnerable, opening different pathways into the labour market.

Cedefop's work can be divided into three main strands:

Shaping VET

VET systems and institutions must be relevant to individual and labour market needs. Cedefop fosters their renewal and modernisation in response to emerging policy needs and priorities. It monitors labour market changes and policy implementation in the EU Member States and reports on these.

VET systems need to take into account learning acquired in different ways and at different times and allow people to move between countries and sectors. Cedefop promotes the use of European tools such as qualifications frameworks which allow Europeans working or learning abroad to "take their qualifications with them" by facilitating understanding and recognition of these.

Valuing VET

The ultimate goal of VET policy is to meet the needs of individuals: to strengthen their employability, help them find and keep jobs and allow them to make a good living. At individual countries' request, Cedefop reviews their VET policies and programmes to support effective implementation of European policies (e.g. work-based learning and apprenticeships) and policy learning between countries.

With its work on guidance and the validation of non-formal and informal learning, Cedefop promotes access to VET. It supports the inclusive role of VET by facilitating the (re)integration into education and training of low-skilled and other vulnerable groups.

Informing VET

Cedefop looks into how socio-economic and demographic trends affect employment, nature of jobs and demand for skills in the labour market. It forecasts future skills needs and supply to help individuals, employers and policy makers to make informed decisions about education, training and careers. It identifies policies and practices to help policy makers and VET providers address skills mismatches.

Cedefop supports countries to develop their own intelligence and data on skills and employment needs.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. 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:* The potential of work-based learning in developing Upskilling Pathways for adults

b) *Short description of content of this contract:*

Purpose of this study is to understand the potential of work-based learning programmes in developing upskilling pathways type of schemes for adults.

The contractor, in close cooperation with Cedefop project manager(s) will develop a methodology, which exploiting the potential of work-based learning, addresses the upskilling of adults in a coherent and systematic manner. As part of this methodology, the contractor shall develop an analytical framework for upskilling adults, which may support policy makers and other relevant stakeholders in designing and implementing upskilling pathways type schemes for adults.

c) *Type of contract:* Direct Service Contract

1.2. Place of delivery or performance

The tasks will be completed in the Contractor's premises. The meetings will take place in Cedefop's premises.

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

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

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **340,000 EUR** (excl. VAT).

In the case where unforeseen circumstances result in the global value of this contract being consumed faster than originally planned, Cedefop reserves the right to consider conducting a 'Negotiated procedure without prior publication of a contract notice' with the existing contractor(s) in order to increase the maximum amount stated above by up to 50% (Art. 134(e) of the Rules of Application (RAP) implementing the EU Financial Regulation (FR).

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have duration of **18 months**.

1.7. Main terms of financing and payment

Payments will be made as follows:

- **First payment: 30%** after submission of the first interim report and within 60 days of submission of invoices and at the conditions set out in the draft contract.
- **Second payment: 30%** after submission of the second interim report and within 60 days of submission of invoices and at the conditions set out in the draft contract.
- **Payment of the balance: 40%** after submission of the final report and within 60 days of submission of invoices and at the conditions set out in the draft contract.

For further details please refer to the draft contract (Annex B).

2. TERMS OF REFERENCE

2.1. Background information

2.1.1. Rationale and relevance of the project

The economic and financial crisis has profoundly affected labour market dynamics in the Member States. Persistently high unemployment rates, especially among certain groups of the population, (i.e. youths, low qualified and low skilled adults) and lack of employment opportunities may lead to serious long-term consequences. Growing social exclusion, disengagement from the labour market and persistent underuse of human resources can permanently lower potential growth. Having such a pool of talent out of the labour market is even more of acute concern, as improving and maintaining high-level skills and competences of the workforce is essential to ensure that Europe remains competitive and innovative against increasing global competition, fast-changing labour market needs and future demographic challenges.

Skills however, are not only essential to access and progress in the labour market and to engage in further education and training, they are also essential to achieve one's full potential and to play an active role in society.

While educational attainment has increased substantially in recent decades and according to Cedefop forecasts it will continue to fall substantially by 2025, available data depict an alarming picture. Not only, in 2016 one in four European adults aged 25-64 (about 63 million adults) still held only low qualifications², the OECD Survey of Adult Skills (PIAAC, 2013) finds that 18% of the EU adult population has low cognitive skills in literacy and 20% in numeracy (³) with low achievement in these areas more prevalent among those with low qualifications than those with medium or high qualifications. Furthermore, adults with low qualifications and/or low cognitive skills, are less likely to participate in education and training and life long learning, putting them at greater risk of disengagement from the labour market and education and training as well as at greater risk of social exclusion and poverty.

The soon to be published Cedefop study '*Investing in skills pays off: the economic and social cost of low skilled adults in the EU*⁴' clearly demonstrates how adults with low cognitive skills and/or low qualifications are a vulnerable segment of the population. Evidence shows that being low skilled is often associated with a set of negative consequences both at the individual and social level: lower earnings and employment rates, lower quality of health, wellbeing and life satisfaction, lower civic and social engagement, higher probability of involvement in criminal activities, and so forth.

² Eurostat, Labour Force Survey

(³) OECD, 2013, Survey of Adult Skills: PIAAC. Analysis performed for Cedefop's study **Investing in skills pays off: the economic and social cost of low skilled adults in the EU**. For the year in which this analysis was performed PIAAC covers 17 Member States: Belgium (the Flemish Community), Czech Republic, Denmark, Germany, Estonia, Ireland, Spain, France, Italy, Cyprus, Netherlands, Austria, Poland, Slovakia, Finland, Sweden and the UK

⁴ <http://www.cedefop.europa.eu/en/news-and-press/news/executive-summary-investing-skills-pays-economic-and-social-cost-low-skilled>

This is why empowering low skilled adults by means of promoting their upskilling and/or re-skilling is associated with large social and economic benefits not only for the individuals and their families, but also for the economy and society as a whole.

Against this background, the issue of improving people's skills, competences and knowledge is now clearly at the top of the European policy agenda *"The New skills agenda for Europe, Working together to strengthen human capital, employability and competitiveness"*⁵ and the new Recommendation on *"Upskilling pathways: new opportunities for adults"*⁶, have been recently initiated at EU level to support Member States in ensuring that every European acquires the skills to fully realise his/her talent and potential. In particular, the Council Recommendation on *"Upskilling pathways: new opportunities for adults"*⁷ aims to help adults acquire a minimum level of literacy, numeracy and digital skills and/or acquire a broader set of skills by progressing towards an upper secondary qualification or equivalent.

While all Member States have some measures promoting the upskilling and reskilling of adults, the issue of upskilling is rarely addressed in a coherent, systematic and comprehensive manner. The magnitude of the phenomenon and the economic and social costs associated with it, call for innovative and coordinated approaches to upskilling pathways for adults able to pull together various resources and exploit synergies across the different measures and policies already in place.

2.2. Description of the tender

2.2.1. Overall objectives

Aim of this study is to explore ways to approach the upskilling pathways for adults in a coherent and comprehensive manner, making best use of the potential of work-based learning. As part of this methodology, the contractor shall develop an analytical framework for upskilling adults, which may support policy makers and other relevant stakeholders in designing and implementing upskilling pathways type schemes for adults.

⁵European Commission, 2016, <http://ec.europa.eu/social/main.jsp?catId=1223>

⁶ Council of the European Union (2016) Council recommendation of 19 December 2016 on upskilling pathways: new opportunities for adults. Official Journal of the European Union, C 484, 24.12.2016. [http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224\(01\)&from=EN](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224(01)&from=EN)

⁷ Council of the European Union (2016) Council recommendation of 19 December 2016 on upskilling pathways: new opportunities for adults. Official Journal of the European Union, C 484, 24.12.2016. [http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224\(01\)&from=EN](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224(01)&from=EN)

2.2.2. *Subject and scope of the work*

As mentioned above, the magnitude of the low skills phenomenon and the economic and social costs associated with it, call for a renewed approach to upskilling which addresses it in a comprehensive and systematic manner and which enables pulling together various resources and exploiting synergies across the different measures and policies already in place in Europe.

The existence of a comprehensive and systematic approach to upskilling however won't be able to face the skills challenge laying ahead, unless it is able to engage those most at need of upskilling to take part in it. In this context, work-based learning may have a key role to play in enabling that every adult has a chance to fulfil his/her potential.

In addressing the issue of low skills among adults by means of developing an analytical framework for upskilling pathways for adults, this study will adopt a twofold level of analysis:

- At European level, a literature review of good practices in upskilling adults using work-based learning in the EU28, Iceland and Norway and a mapping exercise of the different groups most in need of upskilling in the EU 28, will provide a clear picture of the magnitude of the issue, the identification of priority target groups most in need of upskilling as well as a catalogue of good practices suitable as a 'reference point' for other national contexts.

- At national level, in a selection of 5 Member States where the issue of low skills among specific target groups is of particular concern, this study will explore how upskilling pathways for adults can be effectively designed and implemented availing of the potential of good practices in work-based learning.

Therefore, as a starting point, this study, recognising the potential of work based-learning in addressing the specific needs and characteristics of low skilled adults, shall explore ways to approach the upskilling of adults in a systematic, coherent and comprehensive manner, through the development of an analytical framework, which enables key stakeholders to address the issue of low skilled adults in a systematic, coordinated and comprehensive way.

This study shall also explore how an analytical framework to upskilling adults can be implemented at national, regional or local level in a selection of five (5) EU Member States⁸, with a particular focus on good practices fostering the development of basic skills through work-based learning.

Tenderers are expected to propose and justify the 5 Member States selected as object of this study in their tender proposal. The choice of each country must be clearly explained in the proposal also taking into account the rates of low educated and low skilled adults, their employment rates and labour market situation, their social conditions as well as take into consideration geographical balance and diversity of VET systems.

⁸ Based on national circumstances and structures, the analysis may be performed at national, regional or local level.

Low skilled adults are a very heterogeneous group; each with different characteristics and needs that call for tailored measures responding to the specific needs of each group. Therefore the countries proposed should reflect, not only a balanced representation of the different target groups needing upskilling, but also national and/or regional contexts where the low skills phenomenon among adults is most problematic and where specific target groups are most at need of upskilling in order to prevent them from disengagement from labour market and education and training as well as social exclusion and poverty.

For the purpose of this study, the following terms will be used:

Low skilled adults

For the purpose of this study, low skilled adults shall be understood as adults (aged 25 +) with either:

- Low educational attainment ⁽⁹⁾;
- Obsolete skills (for example due to the effects of long-term unemployment and/or disengagement from the labour market, or due to ageing, technological change, changes in production processes and/or work organisation);
- Mismatched skills (people who have worked in a sector and/or in a job that did not make fully use of their skills/qualifications);
- Working in elementary occupations (ISCO-88 major group 9) ⁽¹⁰⁾.

Operationally, to make use of main statistical sources available low skilled adults could be measured by:

- The level of formal education and qualifications: ISCED 0-2 and 3c-short;
- The level of cognitive skills: people who have obtained a low score on measures of literacy, numeracy or problem solving in technology-rich environments as assessed by the OECD survey of adult skills, PIAAC;
- The level of skill required for different occupations: low-skilled jobs are those in elementary occupations (classified as ISCO-88 major group 9), which require a low-skill level corresponding to a primary level of education.

Basic skills and a wider set of life skills

In line with the Council Recommendation on Upskilling Pathways, basic skills shall be intended as those skills, such as literacy, numeracy and digital skills, which are the foundation for further learning and are a gateway to employment and social inclusion. However, along basic skills, a wider set of skills and competences often referred to as life skills, (e.g. critical thinking, creativity, sense of initiative and entrepreneurship etc.) are also essential to foster active participation in the labour market and in society.

These conceptualisations build on Recommendation 2006/962/EC on Key Competences for Life Long Learning which identifies 8 key competences helping learners to fulfil their potential and engage in society and in the labour market.

⁽⁹⁾ Individuals whose schooling is below any level of secondary education corresponding to levels 0-2 and 3c-short of the ISCED classification (International Standard Classification of Education)

⁽¹⁰⁾ This definition is, e.g., used by manuals and research practices of international organisations, such as ILO or OECD which equate ISCO-88 major group 9, elementary occupations, with the low-skilled level.

Key competences can be divided into three groups¹¹:

- (a) Those associated with particular subjects or disciplines (e.g. mathematical and scientific competences);
- (b) Cross-disciplinary competences (e.g. digital competence, social and civic competence);
- (c) Transversal competences (e.g. creativity, problem solving).

Work-based learning

Work-based learning programmes are programmes entirely or predominantly based in a work setting, i.e. in a work-based context or in the workplace itself. They aim at developing knowledge, skills and competences that are relevant, in a broad sense, for the world of work, and use work and work tasks as predominant context for learning. Work-based learning programmes may be particularly suitable to address the needs of low qualified and low skilled adults, who are likely to have a history of educational failure and negative experience. The potential of work-based learning programmes lies not only in the skills they can foster, but also the mode of delivery and a range of other factors, such as the opportunity to connect with potential employers and support for a gradual transition from training to work.¹²

Good practices

Good practices are a set of policies or programmes, which lead to the achievement of specific goals/objectives under sustainable conditions and enabling partial or global transfer.

A good practice is therefore a practice that has been proven to work well and produce good results, and may be therefore recommended as a model in similar contextual conditions.

In line with the specific methodology proposed, tenderers are expected to discuss the rationale of their approach and which specific set of criteria will be used for the identification of good practices of upskilling adults through work-based learning.

Geographical coverage (EU+)

The service to be delivered will cover the EU-28 Member States plus Norway and Iceland (hereafter called EU-28+).

The study builds on **four (4) tasks** that serve the above-mentioned overall objectives.

The four tasks are:

- I. Develop an analytical framework for 'upskilling pathways' type schemes and carry out a literature review of good practices of upskilling adults through work-based learning in the EU-28+;
- II. Map the EU-28+ adult population in need of upskilling and identify priority target groups;
- III. Map existing provisions of upskilling adults (in 5 countries);
- IV. The role of work-based learning to address existing gaps (in 5 countries).

The four tasks with their particular objectives are described in detail below.

¹¹ Cedefop (2009). *The shift to learning outcomes: policies and practice in Europe*. Luxembourg: Publications Office. Cedefop Reference series; No 72.

http://www.cedefop.europa.eu/EN/Files/3054_en.pdf.

¹² Cedefop, 2013, *Return to work*, <http://www.cedefop.europa.eu/en/publications-and-resources/publications/6121>

2.3. Requested services and tasks

2.3.1. Tasks and expected deliverables

Throughout the execution of the study, the contractor will be working in close collaboration with Cedefop project manager(s) responsible for this project. The study will be organised in four (4) tasks:

Task 1: Develop an analytical framework for ‘upskilling pathways’ type schemes and carry out a literature review of good practices of upskilling adults through work-based learning in the EU 28 +

Aim of this task is the development of an analytical framework for upskilling adults, which enables Member States and key stakeholders to address this issue in a comprehensive and systematic manner.

In order to meet this aim, the contractor is expected to:

- a) Perform a literature review of current good policies/practices of upskilling adults which make use of the potential of work-based learning in EU-28+ and map basic trends and driving forces behind the development of such upskilling approaches.

On the basis of a thorough literature review, in order to identify potential good policies/practices of upskilling adults availing of the potential of work-based learning at national and/or regional/local level, the contractor shall analyse and select them according to a clear set of criteria and indicators, which shall be discussed in the tender offer and agreed with Cedefop during the inception phase of the project.

The following list of indicators may be used by the tenderer as reference point:

- 1) Relevance to EU policy (ET2020 indicators, employment and social inclusion);
 - 2) Clarity in the definition of objectives, activities to be carried out, stakeholders, target group;
 - 3) Consistency, between set goals and activities implemented;
 - 4) Innovation, that is the degree of ‘innovativeness’/ novelty with respect to policy, governance, partnership or processes;
 - 5) Effectiveness, (where possible) the extent to which objectives set are achieved;
 - 6) Sustainability and leverage, degree of self-funding capacity and / or to ‘survive’ after the end of public support;
 - 7) Replicability, policy / governance suitability to be replicated as such in similar context;
 - 8) Transferability, policy / governance suitability to be taken as a model and adapted for different context;
 - 9) Integration, between VET policies and between VET and other policies;
 - 10) Information, availability, clarity and completeness of information available.
- b) Develop, based on findings from the literature review, an analytical framework for providing adults with upskilling pathways. Such analytical framework for upskilling pathways type schemes shall enable Member States and key stakeholders to address the upskilling of adults in a comprehensive and systematic manner.

The methodology behind the development of the analytical framework for upskilling pathways type schemes, its research tools and specific outputs should be clear, sound and well justified in the tender offer. In doing this, the contractor should also take into account the Council Recommendation on Upskilling Pathways¹³.

In developing an analytical framework for upskilling, the following aspects could be considered:

- Clear identification of target groups and their needs;
- Governance:
 - i. Main actors to be involved/ partnerships;
 - ii. Division of responsibilities at current level of coordination among different stakeholders;
 - iii. Existing authority for the coordination of actions and possibilities and challenges in identifying and establishing one;
 - iv. Engagement of adult learning practitioners and social partners;
 - v. Possible institutional frictions and structural constraints.
- Steps and processes:
 - vi. Outreach and guidance;
 - vii. Skills assessment;
 - viii. Flexible and tailored learning offer of education and training;
 - ix. Recognition and validation of skills and competences acquired;
- Financing and other (non-financial) support measures;
- Establishment of indicators for monitoring and evaluation and their governance.

The successful tenderer is expected to liaise closely with Cedefop project manager(s) to fine-tune and refine the methodology.

Main method(s): The successful tenderer is expected to perform this task through desk research, including screening relevant documentation (e.g. national and international statistical data, websites, programming documents, evaluation reports etc).

Task 2: Map the EU-28+ adult population in need of upskilling and identify priority target groups

In this task the contractor is expected to map the adult population in need of upskilling in all EU28+. Outcome of this task shall be the analysis of the magnitude and diversity of adult population in needs of upskilling, the identification of different target groups and of the potential needs for policy intervention in the different national context.

The analysis of the different target groups, should take into account the specific needs and characteristics of the low qualified/ low skilled subpopulations, and should stem from the analysis performed using a set of indicators and criteria outlined in the tender proposal and agreed with Cedefop during the inception phase of the project.

¹³ Council of the European Union (2016) Council recommendation of 19 December 2016 on upskilling pathways: new opportunities for adults. *Official Journal of the European Union*, C 484, 24.12.2016. [http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224\(01\)&from=EN](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224(01)&from=EN)

While the tenderer is expected to propose a preliminary list of potential indicators to be used to achieve this task, these may include the following qualitative and quantitative indicators:

- Relevant national and international statistics such as: adult educational attainment, proficiency in basic skills (such as in cognitive skills as measures by PIAAC), adult employment, unemployment and inactivity rates, social inclusion indicators, etc;
- Characteristic of the current framework of adult learning policy and its development since the onset of the crisis;
- Expenditure on active labour market policies;
- Structure and expenditure on Public Employment Services and their capacity.

The final list of indicators will be agreed in writing with the project manager(s) on the basis of the preliminary list of potential indicators proposed by the successful tenderer.

Main method(s): The successful tenderer is expected to perform this task through desk research, including screening relevant documentation (e.g. national and international statistical data - including EU-LFS, EU-SILC, PIAAC, websites, programming documents, evaluation reports, etc.).

Task 3: Map existing provisions of upskilling (in 5 countries)

In this task the contractor is expected to focus its work on the five countries proposed as object of this study.

The contractor shall provide an in-depth mapping of existing provisions (policies and practices) of upskilling pathways for adults in the five EU Member States proposed in the tender proposal and agreed with Cedefop in the inception phase of the project.

For each of the 5 countries, the contractor, using the framework developed in Task 1, is expected to analyse in detail existing provisions or pathways for upskilling adults, with particular focus on those measures making use of work-based learning. Within this task, the contractor should also investigate ways to increase coherence and coordination among existing provisions.

Main method(s): The successful tenderer is expected to perform this task through desk research, including screening relevant documentation (e.g. national and international statistical data, websites, programming documents, evaluation reports etc).

Task 4: Address existing gaps using work-based learning (in 5 countries)

Building on the findings from the previous tasks (1-3), aim of this task (4) is to analyse, for each of the 5 country object of this study, the potential of work-based learning in implementing coherent upskilling pathways for adults in line with the analytical framework developed in task 1.

This task comprises three (3) subsequent steps:

For each of the 5 countries:

- a. The contractor shall examine how the upskilling measures identified under task 3 address the needs of the different target groups as identified in task 2. Outcome of this analysis will be the identification, in the 5 countries, of existing gaps which can be successfully addressed through work-based learning.
- b. Based on results from the literature review of good practices carried out in task 1, the contractor is expected to identify those *good practices of upskilling using work-based learning* which may potentially address the gaps identified in the previous step of this task (4a). Specifically, the contractor should identify those practices of upskilling using work-based learning which may be recommended as a model to address the gaps identified in task 4a for the 5 countries under analysis. For each good practice suitable to be (partly or globally) transferred in the 5 countries, the contractor should analyse in depth its key characteristics and lesson learnt as well as the main barriers and challenges (institutional and practical) occurred throughout its entire process of design, implementation, delivery and monitoring. The contractor is also expected to analyse thoroughly challenges and limitations to the transferability of each of the good practice identified, in accordance with the analytical framework developed under Task 1.
- c. Finally, starting from the outcomes of steps 4a and 4b, the contractor is to formulate country specific solutions and develop recommendations on what and how to improve.

Main method(s): The successful tenderer is expected to perform this task through desk research, including screening relevant documentation (e.g. national and international statistical data, websites, programming documents, evaluation reports etc), policy learning activities to engage national stakeholders and policy makers, qualitative interviews with relevant stakeholders (at least one focus group per country and at least 20 interviews).

Interviews are to follow a half-standardised qualitative interview guideline to be agreed with Cedefop and which may be adapted in accordance with the specific requirement of the country/region object of the interview. The list of interviewees must be agreed with Cedefop and should the contractor deem this useful, Cedefop may provide an official letter confirming the contractor's involvement in this project and asking potential interviewees for cooperation.

The information collected in the interviews and focus group will be summarised and analysed by the contractor. A template to standardise the presentation of the findings (in English) will be provided by Cedefop and agreed with the contractor. Interview partners and focus group participants must validate interviews' findings.

2.4. Reports

2.4.1. Reporting requirements

The following reports, all in English, will be required:

(a) Inception report

A draft of the inception report is due 6 weeks after the entry into force of the contract and it should include:

- The fine-tuned methodology and the basis for the organisation of the activities (any research tools, bibliographies, draft list of interviewees, draft selection of countries, draft selection of good practices, etc.);
- A revised work plan and timing.

Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s). A reviewed inception report is due 2 week after Cedefop feedback on the draft inception report and will be the basis for the discussion during the inception meeting. Following the inception meeting the contractor will provide the final inception report.

(b) First interim report

A first draft interim report is due to be submitted in the fourth (4th) month after signature of the contract.

This first interim report should include:

- Results from the literature review including criteria and indicators for selecting good practices;
- Draft analytical framework for upskilling adults, including its rationale, methodology, research tools, outputs etc;
- Information on work carried out including problems encountered or risk expected, solutions applied and potential impact on the study.

The draft interim report will be discussed with Cedefop during the inception meeting.

Cedefop will provide comments to the first draft interim report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s) and provide the final first interim report.

(c) Second interim report

A draft second interim report shall be submitted in the 9th month after signature of the contract.

The second draft interim report shall include:

- Consolidated analytical framework for upskilling adults, including its rationale, methodology, research tools, outputs etc;
- Intermediate findings (including results from the mapping of the population in need of upskilling and priority target groups identification -task 2, and the mapping of the existing provisions of upskilling–task 3);
- Preparatory work on task 4;
- Information on work carried out including problems encountered or risk expected, solutions applied and potential impact on the study.

The draft second interim report will be discussed with Cedefop during the validation meeting.

Cedefop will provide comments to the second draft interim report. The Contractor should address those comments, liaising closely with Cedefop's project managers and provide the final second interim report.

(d) Final report

A draft final report shall be submitted the 13th month after signature of the contract.

The final report shall include:

- An executive summary highlighting the main findings from the study and key considerations for policy development and research activities. The executive summary shall be a self standing document (6-8 pages);
- Rationale for the study;
- Final findings including results from the literature review of good practices of upskilling using work-based learning, consolidated analytical framework (including its methodology, tools etc.), results of mapping of the population in need of upskilling, results from the country case studies (task 2, 3 and 4);
- Interviews' reports and reports from focus groups, including participants' lists;
- Conclusions and policy pointers;
- Bibliography and annexes as necessary.

The draft final report will be discussed with Cedefop during the final meeting.

Cedefop will provide comments on the final report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s) and provide the finalised final report.

The final report will be submitted the 15th month after signature of the contract.

2.4.2. Submission & approval of reports

Copies of the reports referred to above must be submitted to the Cedefop Project manager. The reports must be written in English.

2.4.3. Proof-reading & editing in English of final reports

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

2.4.4 Exploitation of the results of the contract / Anti-plagiarism checks

Tenderers are requested to read carefully the following articles of the draft contract (in Annex II of the procurement documents):

Article I.10 – Exploitation of the Results of the Contract

Article II.13 – Intellectual Property Rights.

Article I.14.1 – Other Special Conditions, which complements the provisions of Article II.13 as regards the use of results of the research by the contractor.

Article I.14.2 – Anti-plagiarism checks.

2.5. Meeting and Travel Expenses

2.5.1. Management Meetings

The experts (minimum 2) responsible for the co-ordination of the study on behalf of the contractor will be requested to attend the following **4 one-day** meetings at Cedefop premises (in Thessaloniki) with the project manager(s) responsible.

- a) One inception meeting to take place approximately 8 weeks following signature of the contract to discuss the inception report, with special attention to the organisation of the activities, and in general to fine-tune the final planning of the activities and relative timing;
- b) One interim meeting to take place after the first interim report is submitted.
- c) One validation meeting to take place after delivery of the second interim report.
- d) One final meeting to take place after delivery of the draft final report.

All costs foreseen, including travel & accommodation are to be included in the financial offer (see table in point 5.4 - item 2a).

2.5.2. Travel expenses related to the fieldwork activities

All travel expenses related to the fieldwork activities have also to be included in the financial offer (see table in point 5.4 - item 2b).

2.5.3. Whenever necessary, Cedefop may decide to organise additional management meetings

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 III of the Draft Contract in Annex B).

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 (invoiced financial value) of the tenderer for the last **three (3)** financial years concerning socio-economic research and policy analysis should be at least **450,000 €**.

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 (3)** financial years concerning socio-economic research and policy analysis.

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

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors. For tenderers or 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 (3)** 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 their 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 adequate experience to perform the services described in the Terms of Reference;

Have provided services in the past **3 (three)** years in execution of contract(s) in the field of research and comparative analysis on vocational education and training and/or labour market and skills analysis at international level, with a combined total value of **300,000 € at minimum (invoiced financial value)**;
- The Tenderer's experts, whose involvement will be instrumental for the successful implementation of the contract, must have profiles, knowledge and experience relevant to the subject of the contract as follows:

➤ **Team Leader (1 member)**

- University degree at bachelor or master or PhD level in social sciences;
- A minimum of eight (8) years of experience in research/policy analysis on vocational education and training and/or labour market/skills analysis at European level;
- A minimum of five (5) years of experience in coordination and management of research/policy analysis on vocational education and training and/or labour market/skills analysis at European level;
- At least two relevant publications in the field of vocational education and training and/or labour market and skills analysis at European level.

➤ **Senior experts (4 members)**

- All senior experts: university degree at bachelor or master or PhD level in social sciences;
- At least 1 senior expert: a minimum of five (5) years' experience in vocational education and training and/or labour market/skills analysis at European level;
- At least 1 senior expert with a minimum of three (3) years' experience in evaluating education and training systems;
- At least 1 senior expert with a minimum of five (5) years' experience in primary data collection, including developing research tools, and qualitative/quantitative analysis of the collected data;
- At least 1 senior expert with a minimum of five (5) years' experience in research and comparative analysis at European level in adult learning and in particular of work-based learning policies/programmes.

➤ **Junior experts (at least 2 members)**

- University degree at bachelor or master or PhD level in social sciences;
- At least two (2) years of relevant experience in research on vocational education and training and/or labour market/skills analysis at European level.

➤ **Country experts (no minimum number specified but together they should be able to cover all the 5 countries that are subject of this study)**

- University degree at bachelor or master or PhD level in social sciences;
- Knowledge of vocational education and training and/or labour market/skills analysis at national level demonstrated by a minimum of three (3) years or relevant professional experience in research and policy evaluations/assessment;
- Minimum of three (3) years' experience in conducting qualitative case studies, including interviews and focus group, in the field of this tender at European and/or national level;
- Linguistic ability to conduct national research/interviews/focus groups in the official language spoken in the country for which each country expert is responsible. (Level C1 of the Common European Framework of Reference for Languages¹⁴ in the official language spoken in the 5 countries selected in the technical proposal.)

¹⁴ <http://europass.cedefop.europa.eu/resources/european-language-levels-cefr>

All experts (including the country experts) should communicate and draft to a high standard in English at Level C1 of the Common European Framework of Reference for Languages¹⁵. In addition each country expert should be able to communicate and draft to a high standard in the official language of the country for which s/he is responsible.

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 contract(s) with services provided by the deadline for submission of offers and within the past **three (3)** years, in the field of research and comparative analysis on vocational education and training and/or labour market and skills analysis at international level and with total amount of min. **300,000 EUR (invoiced financial value)**, describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Questionnaire 3 of Annex G**);
- The Europass curriculum vitae format (<https://europass.cedefop.europa.eu>) or similar format shall be filled in by each person involved in the execution of the tasks foreseen in this tender. CVs must clearly specify the role of the expert in the team at the top of the first page and his/her experience demonstrating that s/he meets the requirements.
- For each CV all fields of **Questionnaire 5 of Annex G** must also be filled-in, synthesizing information aimed at demonstrating the professional capacity of the team member as above requested. In particular, in **Questionnaire 5 of Annex G** tenderers are requested to clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, main activities and responsibilities), and clearly present linguistic abilities. In addition the CV of the team leader should also include a list of his/her publications (at least two) relevant to the subject of this tender.

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).

¹⁵ <http://europass.cedefop.europa.eu/resources/european-language-levels-cefr>

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 the award (evaluation) criteria and in total a minimum of **65** 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 criteria	Maximum number of points
A. UNDERSTANDING AND RATIONALE OF THE PROJECT <i>Point 2 of the framework template in section 5.2</i>	20
1. The level of understanding of issues related to upskilling adults (in particular in relation to the key terms to be used in this study and key challenges in designing and implementing upskilling pathways for adults)	15
2. Discussion on the Terms of Reference demonstrating in-depth understanding of key issues, including critical aspects, to the achievement of expected results.	5

B. METHODOLOGY – Methods and tools <i>Point 3 of the framework template in section 5.2</i>	60
3.1. Appropriateness and quality of the main steps and methodological approach proposed to develop the analytical framework, its tools and output;	30
3.2. Quality and relevance of the proposed criteria/ indicators to be used to identify good practices of upskilling adults through work-based learning.	
3.3. Appropriateness and quality of the methodology proposed for mapping the adult population in need of upskilling and identify priority target groups.	
3.4. Sound and appropriate rationale for proposing a set of five (5) countries object of this study according to a list of quality and relevant criteria/indicators.	
3.5. Appropriateness and clarity of the methodological approach proposed to carry out five (5) country case studies including: a. Approach to carry out the gap analysis; b. Approach to surveying stakeholders (stakeholders interviews min. 20¹⁶ and focus groups): • Country specific strategies to ensure meaningful coverage. • Possible categories of stakeholders, methods to identify them, approach them and bring them together.	30
C. ORGANISATION, PROJECT MANAGEMENT AND STAFF ALLOCATION	20
4. Allocation of tasks, type and degree of involvement of the proposed experts and proposed coordination with Cedefop. <i>Point 4 of the framework template in section 5.2</i>	5
5. Well specified quality assurance measures and appropriate risk management with clear project specificity. <i>Point 5 of the framework template in section 5.2</i>	5
6. Organisation of the work as defined in the terms of reference within the given deadlines, clear explanation of the phases of the project, coherence, adequacy and feasibility of the timetable. <i>Point 6 of the framework template in section 5.2</i>	10
Overall total score (Total Quality Value -TQV)	100

¹⁶ Tenderers are requested to carry out at least 20 interviews per country. Additional interviews per country may be proposed but will not be awarded additional points.

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

- do not reach a minimum of 50% of the possible score for the award (evaluation) criteria and
- obtain an overall total score (Total Quality value) of less than the total **65** (of a maximum of 100) points against the award (technical) criteria,

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

5.2. Technical proposal

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

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria.

It is up to the tenderer to present in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full with) all requirements outlined in the Terms of Reference.

Tenderers are requested to include their technical proposal (envelope B) in one original

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide a proposal on the basis of the following template:

1. Summary of proposal:
 - 1.1. Overall synthesis (in bullets);
 - 1.2. Highlight of the key/qualifying aspects of the proposal;
 - 1.3. Any additional service offered.
2. Understanding and rationale of the project:
 - 2.1. A concise discussion on the subject of upskilling adults: demonstrating in-depth understanding of the different concepts and dimensions, including a clear understanding of the key terms to be used in this study and how, in line with the specific methodology proposed in the tender proposal, such terms will be approached and analysed. Clear understanding of key challenges in designing and implementing upskilling pathways for adults. A tentative list of sources and literature on the subject.
 - 2.2. Comments on the Terms of Reference demonstrating in-depth understanding of key issues, including critical aspects to the achievement of expected results, possible methodological and technical difficulties and constraints, anticipation of possible solutions. Completeness of the service offered compared to the technical specifications.
3. Methods and tools:
 - 3.1. Main step and methodology in developing the analytical framework, its tools and output, including main sources of information, set of indicators/criteria and preliminary structure;
 - 3.2. Clear and sound justification for the proposed criteria/ indicators to be used to identify good practices of upskilling adults through work-based learning;
 - 3.3. Methodology for mapping the adult population in need of upskilling and identify priority target groups;
 - 3.4. Rationale for proposing a set of 5 countries object of this study according to a list of criteria/indicators which will ensure a balance of priority target groups in need of upskilling and selection of countries where specific target groups are most in need of upskilling;
 - 3.5. Approach to carry out 5 country case studies including:
 - a) Approach to carry out the gap analysis;
 - b) Approach to surveying stakeholders (stakeholders interviews and focus groups):
 - Country specific strategies to ensure meaningful coverage;
 - Possible categories of stakeholders, methods to identify them, approach them and bring them together;
4. Composition of the proposed team, nature and extent of the team members' participation in the study including allocation of tasks, function and role of the team leader, management structure and reporting and coordination with Cedefop.
5. Description of quality assurance measures and structured information on risk management and risk mitigation activities to be implemented (tools and processes to be used taking into account the specific characteristics of the project, back up/ replacement arrangements, adequate consideration of possible hindrances).
6. Detailed work plan illustrating intended organisation and management of the work process and demonstrating the feasibility of the proposal (timetable and project's workflow outlining the intended organisation, milestones and deliverables).

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Manager or two different persons can be identified. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

In addition to the above the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 10% of the work by value (or of *all* subcontractors if total subcontracting is above 40% of the work by value) as requested in point 4.2.

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

5.3. Financial evaluation

Only tenders scoring in total **65** 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 award criterion 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).

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.
- Prices must be quoted in EURO and include all expenses.
- The VAT amount must be indicated separately (this applies to tenderers established in Greece only).

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 **30%**

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

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 should indicate the total price 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 clearly match the Terms of Reference and the estimate of value. All services that shall be procured should be included. The cost of professional proof-reading and editing in English of the final report(s) as submitted to Cedefop (see point 2.4.3) should be included in item 2c) of the table below.

Price schedule table

1)	Names / positions of the Experts /Service (if applicable)	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending 4 one-day meetings at Cedefop premises in Thessaloniki (see point 2.5.1)	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks (see point 2.5.2)	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommodation, etc.
	2c) Other administrative expenses including professional proof-reading and editing in English of final report (see point 2.4.3)	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+2b+2c)				
3)	Total Price (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2			

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

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.

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 H	☐	☐	

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 *.pdf files)

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)