

FINANCE AND PROCUREMENT

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 Thessaloniki, 15 July 2016

OPEN INVITATION TO TENDER

Initial VET qualifications at EQF levels 3 and 4 **AO/DSI/SPEV/Qualifications_EQF_levels_3&4/011/16**

 REFERENCE: *Contract notice 2016/S 135-242323 of 15/07/2016*

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.f

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

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

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

or

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

or

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

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

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

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

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

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

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

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

OPEN INVITATION TO TENDER <i>CEDEFOP No: AO/DSI/SPEV/Qualifications_EQF_levels_3&4/011/16</i> <i>‘Initial VET qualifications at EQF levels 3 and 4’</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.

- 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)	30 August 2016	N/A
Last date on which clarifications are issued by Cedefop	1 September 2016	N/A
Deadline for submission of tenders (hand delivered)	8 September 2016	17h00
Deadline for submission of tenders by post / courier	8 September 2016	N/A
Validity of the tenders	7 March 2017	N/A
Tender opening session	22 September 2016	11h00
Estimated contract signature date	November 2016	

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

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

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

10. All costs incurred for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.
11. Up to the point of signature, the contracting authority (i.e. Cedefop) may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon:
 - the signature of the Contract with the successful tenderer, or
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,

Isabelle Thomas-Kollias
Acting Head of 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/DSI/SPEV/Qualifications_EQF_levels_3&4/011/16

‘Initial VET qualifications at EQF levels 3 and 4’

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

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

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽²⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

Modern VET systems must be relevant to individual and labour market needs. They should take into account learning acquired in different ways (for example through work experience) and at different times and allow people to move between countries and sectors.

Member States decide national VET policies and Cedefop monitors and reports on the reforms and changes they make to their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with Member States and social partners, has agreed shared objectives. As part of this cooperation, Cedefop has helped develop, and is now working to implement, common European tools and principles, which aim to make it both easier to work and study abroad and move between different parts of a national education and training system (for example between general and vocational education).

- **Careers and transitions – Continuing VET, adult and work-based learning**

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness. New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

⁽²⁾ Cedefop also works with Iceland and Norway.

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

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

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

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year.

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

1. OVERVIEW OF THIS TENDER PROCEDURE

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

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

1.1. Description and type of the contract

a) *Title of the contract:* Initial VET Qualifications at EQF levels 3 and 4

b) Short description of content of this contract:

The key objective of this study is to contribute to better understanding of the comparability of qualifications from initial vocational education and training (IVET), assigned to levels 3 and 4 of the European qualifications framework (EQF) through the respective national qualifications frameworks (NQFs). It will map the qualifications linked to the EQF levels, collect and analyse evidence on how learning outcomes approaches have been used for assigning initial vocational qualifications to NQF/EQF levels. The analysis will not only focus on technical evidence, but also take into account broader social and economic contexts in which qualifications are embedded.

1.2. Place of delivery or performance

The tasks will be completed in the Contractor's premises. Meetings will take place at Cedefop's premises (Thessaloniki and Brussels).

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 **260,000 Euro (without VAT)**.

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:** 20% after submission of 1st interim report due 4 months after the date of signature and within 30 days of submission of invoices and the conditions set out in the contract.
- **Second payment:** 40% after submission of 2nd interim report and within 60 days of submission of invoices and at the conditions set out in the contract.
- **Payment of the balance:** 40% after submission of final report and within 60 days of submission of invoices and at the conditions set out in the contract.

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

2. TERMS OF REFERENCE

This study will contribute to a better understanding of comparability of qualifications from initial vocational education and training (IVET) referenced – through the national qualifications frameworks (NQFs) - to the European qualifications framework (EQF). The focus will be on initial vocational qualifications linked to EQF levels 3 and 4. The study will take as a starting point the EU and EEA countries having completed the referencing process to the EQF by mid-June 2016.

2.1. General background

The study is linked to the implementation of the Recommendation of the European Parliament and the Council on the European Qualifications Framework for Lifelong Learning (EQF)⁽³⁾ and the corresponding national qualifications frameworks (NQFs).

The European Qualifications Framework for Lifelong Learning was established in 2008 to make qualifications more comparable and portable across Europe and support mobility and lifelong learning. The Recommendation created a common reference framework of eight levels of learning outcomes that serve as a translation grid between national qualification systems. As an overarching and comprehensive framework, EQF covers qualifications at all levels and in all sub-systems of education and training – vocational education and training being an integral part of them. The Recommendation invites countries to relate their national qualifications levels to the EQF and introduce a reference to the EQF levels in all new qualifications certificates and diplomas.

Thirty-nine European countries have committed to the EQF implementation. The comparison of national qualifications levels and qualifications to the EQF is done through a process called ‘referencing’. Through this process, national authorities responsible for qualification systems, in cooperation with stakeholders responsible for developing and using qualifications define the links and correspondence between the levels of national qualifications and those of the EQF. Consequently, national qualifications levels and qualifications can be compared across countries. In most cases, outcome-based national qualifications frameworks form the basis for the referencing process, classifying national qualifications to NQF levels and relating them to the EQF levels.⁽⁴⁾ The EQF Advisory Group – the main body overseeing the EQF implementation – has endorsed 10 criteria⁽⁵⁾ to guide coherence and consistency of the referencing process across countries.

By mid-June 2016, 26 EU and EEA countries⁽⁶⁾ have linked national qualifications levels to the EQF levels.⁽⁷⁾

⁽³⁾ 2008/C 111/01 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

⁽⁴⁾ See Cedefop. 2014 Analysis and overview of NQF developments in European countries. <http://www.cedefop.europa.eu/en/publications-and-resources/publications/6127> and a short summary of National Qualifications Frameworks in Europe (anniversary publication), <http://www.cedefop.europa.eu/en/publications-and-resources/publications/4137>

⁽⁵⁾ <http://ec.europa.eu/transparency/regexpert/index.cfm?do=groupDetail.groupDetailDoc&id=10973&no=2>

⁽⁶⁾ Austria, Belgium (Flanders and Wallonia), Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Slovenia, Sweden, Switzerland and the United Kingdom (England, Scotland and Wales)

⁽⁷⁾ Referencing reports are available on <https://ec.europa.eu/ploteus/documentation>

The study will take account of international ⁽⁸⁾ and national research on initial vocational qualifications assigned to EQF levels 3 and 4 through national qualifications frameworks (NQF) and will build on this research. It will focus on the characteristics, similarities and differences of initial VET qualifications assigned to EQF levels 3 and 4. The study should pay particular attention to the way learning outcomes are used for describing and levelling IVET qualifications to the EQF through NQFs.

2.1.2 Learning outcomes and horizontal comparisons

One of the objectives of the EQF is to make qualifications levels comparable horizontally between countries. This process depends on the involvement of stakeholders at national and European level. Additionally, for the EQF to generate trust across countries, it is important to consider not only the level but also the profile and learning outcomes (knowledge, skills and competences) of a qualification.

The first round of referencing national qualifications levels to the EQF is now close to be finalised. This provides us with evidence on how this process has been done, which qualifications have been included, which methods and evidence has been used to establish the link and which challenges countries have encountered. The implementation of NQFs, their learning outcomes-based levels and their links to the EQF provide a good basis for comparing how learning outcomes approaches are used to link IVET qualifications to NQFs and, subsequently to the EQF. Additionally, it helps to compare and better understand the content and profile of IVET qualifications. This contributes to transparency and to a better understanding of comparability of IVET qualifications ⁽⁹⁾ linked to the EQF levels.

The study will carry out research on the way learning outcomes approaches have been used to describe and assign initial VET qualifications – through NQFs – to the EQF levels. It will analyse the similarities and differences of IVET qualifications linked to these levels within a country and across countries and whether qualifications assigned to the same EQF level are based on a shared understanding of learning outcomes descriptions and/or why seemingly comparable qualifications have been assigned to different EQF levels.

⁽⁸⁾ Brockmann et al. (2011) Knowledge, skills and competence in the European labour market. London: Routledge, Baethge and Arends (2009) Feasibility Study VET-LSA. Bonn: The Federal Ministry of Education and Research (BMBF), https://www.bmbf.de/pub/band_acht_berufsbildungsforschung_eng.pdf

Spöttl, Georg; Ruth, Klaus (Hrsg.) ECVET – Kompatibilität von Kompetenzen im Kfz-Sektor ECVET – Compatibility of Competences in the Automotive Sector. Impuls 42, Schriftenreihe der Nationalen Agentur Bildung für Europa beim Bundesinstitut für Berufsbildung. http://www.ecvet-info.de/media/impuls_42.pdf

Cedefop. 2009. The dynamics of qualifications: defining and renewing occupational and educational standards <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5195>

Cedefop. 2010. Changing qualifications http://www.cedefop.europa.eu/EN/Files/3059_en.pdf

Cedefop. 2012. Learning outcomes approaches in VET curricula www.cedefop.europa.eu/files/5506_en.pdf

Cedefop. 2015. Ensuring the quality of certification in vocational education and training <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5551>

Cedefop. 2016. Application of learning outcomes approaches across Europe. Forthcoming.

Cedefop. The role of learning outcomes in supporting dialogue between the labour market and education and training. Forthcoming.

⁽⁹⁾Comparability of qualifications as defined by Cedefop, (2014) is the 'extent to which it is possible to establish equivalence between the level and content of qualifications (certificates, diplomas or titles) at sectoral, regional, national or international levels. (Terminology of European education and training policy)

While, overall learning outcomes play an increasingly important role, their degree of implementation still varies between countries and education sectors. ⁽¹⁰⁾ The VET sector stands out as the part of education and training where learning outcomes are most widely implemented and have the longest tradition. ⁽¹¹⁾ The study will build on this.

2.1.3. Contexts and initial VET qualifications

European VET systems are embedded in national contexts and traditions, industrial relations and production markets. This has led to the development of diverse vocational qualification systems and vocational qualifications across Europe. (Brockmann et al, 2011).

Distinct traditions of VET systems and labour market regimes shape the way VET is organised, governed and how it links to the labour market. It may also influence the understanding of a VET qualification and what a holder of a qualification can do with a particular qualification in the labour market and in further learning. Many VET qualifications have a dual currency, within the education systems and in the labour market.

To cope with these differences, the EQF is a tool to help compare national qualification systems and ensure that the learning outcomes of each qualification can be more easily understood and compared.

The study will look into qualifications from initial VET ⁽¹²⁾ assigned to EQF levels 3 and 4 ⁽¹³⁾, which include a heterogeneous mix of qualifications, as the so-called 'national referencing reports' show. These qualifications may differ in a number of aspects e.g. purpose, content and profile, general educational objectives as well as duration of related programs, provision mode (school-based and dual-VET), progression opportunities, access to the labour market¹⁴ etc.

⁽¹⁰⁾ Cedefop. Briefing note on NQFs are coming of age. <http://www.cedefop.europa.eu/si/news-and-press/news/coming-age-qualifications-frameworks-europe>

⁽¹¹⁾ Cedefop. 2016. Application of learning outcomes approaches across Europe. Forthcoming.

⁽¹²⁾ According to Cedefop Terminology of European education and training policy (2014) initial education and training is defined as 'General or vocational education and training carried out in the initial education system, usually before entering working life.'

⁽¹³⁾ In some case it might be also the EQF 5.

⁽¹⁴⁾ IVET qualifications at EQF levels 3 and 4 lead to skilled work. The qualification attests that the person is a qualified and skilled worker, i.e. that /s/he has the knowledge, skills and competence required to practice an occupation. The scope of activities of a skilled worker may differ across countries. Spöttl and Ruth, 2011 provide some characteristics of a skilled worker. A skilled worker is capable of carrying out all skills requirements of an occupational area or profile. Beyond the mere coverage of all skills requirements which underline the complete sequence of standards, a skilled worker is in a command of the vocational autonomy and has the ability to assess the nature of the work to be done, to plan it in all aspects, to carry it out and to hand over or pass on the completed work whenever relevant. http://www.ecvet-info.de/media/impuls_42.pdf

Some examples of initial VET qualifications s from the referencing reports ⁽¹⁵⁾ are provided bellow:

CZ: upper secondary education apprenticeship certificates are assigned to EQF level 3 and four year upper secondary VET with maturita exam to EQF level 4

FR: CAP, secondary vocational certificates are linked to EQF level 3 and vocational and technological baccalaureates and technician certificates to EQF level 4

HR: upper secondary VET certificates are at EQF level 3 following 2 years of VET; upper secondary VET certificates assigned to EQF level 4 are awarded upon completion of 3- and 4-year VET programs

DE: qualifications at EQF level 3 are awarded at the end of 2-year dual VET programs and those at EQF level 4 upon completion of 3-3,5 years of dual VET programs and full time vocational school-based VET

IS: vocational qualifications for professional rights are linked to EQF level 3 and vocational examinations for professional rights to EQF level 4

IT: professional operator certificate is assigned the EQF level 3; professional technician diplomas, upper secondary education diplomas awarded in technical schools and upper secondary education diplomas from vocational schools are linked to the EQF level 4

LV: diploma of vocational secondary education is linked to EQF level 4

NO: certificates of completed vocational upper secondary education are linked to EQF level 4

SI: upper secondary VET certificates from three year vocational education and vocational matura certificates awarded upon competition of four year secondary technical education are linked to the EQF level 4

2.2. Objective, purpose and expected results

2.2.1 Overall objective

The first round of referencing national qualifications levels to the EQF is now close to completion. This provides us with evidence on how national qualifications levels are linked to the EQF and how the referencing methodology has been used to establish the link. Putting the evidence gathered through this process into comparative perspective contributes to better transparency and understanding of qualifications – the ultimate objectives of the EQF. Thus, the key objective of this study is to shed some comparative light on evidence gathered through the referencing process ⁽¹⁶⁾. The study will map the main initial VET qualifications (types) linked to the EQF levels 3 and 4, collect and analyse evidence on how learning outcomes approaches have been used for

⁽¹⁵⁾ <https://ec.europa.eu/ploteus/documentation>

⁽¹⁶⁾ The extent to which EQF national referencing reports contain information on the content and profile of qualifications differs across countries. The contractor will thus propose other means to collect information on initial vocational qualifications linked to EQF levels 3 and 4.

describing and linking qualifications from IVET to the respective EQF levels. The analysis will not only focus on technical evidence, but will also take into account contextual factors that might reflect on the levelling of qualifications from IVET.

2.2.2 Purpose

The purpose of the study is to strengthen Cedefop's knowledge base in five essential areas:

- To gather comparative evidence on how learning outcomes and 'best fit' approaches were used in referencing qualifications from initial VET – through NQFs – to EQF levels 3 and 4.
- To get insights into contextual, social and labour market factors that co-shape the currency of initial VET qualifications.
- To collect comparative evidence on similarities and differences in purpose, profile and content of initial VET qualifications assigned to the EQF levels 3 and 4.
- To contribute to methods and tools for comparing initial VET qualifications.
- To reflect on strengths and weaknesses of referencing initial vocational qualifications to the EQF levels 3 and 4.

2.2.3. Results to be achieved and research questions to be answered

This study will collect and analyse evidence from referencing initial VET qualifications through the NQFs – to the EQF levels 3 and 4 in 26 EU and EEA countries that have completed the process by mid-June 2016. ⁽¹⁷⁾ Evidence on how learning outcomes and 'best fit' approaches as well as other criteria/indicators were used in the referencing process will be provided. Methodologies and tools applied in the process will be collected and analysed. As a result, qualifications (type) fiches with detailed descriptions of qualifications linked to the EQF levels 3 and 4 will be drafted and further complemented by contextual information. The research team will develop a robust analytical framework to analyse and compare initial VET qualifications linked to the EQF levels 3 and 4. **Eight (8) in-depth case studies** will further research and analyse key emerging issues from the overview.

Research questions

The key research questions to be analysed in the framework of this study are:

- a) Which initial VET qualifications (types)¹⁸ have been referenced to levels 3 and 4 of the EQF?
- b) Which are the key purposes and functions of initial VET qualifications assigned to EQF levels 3 and 4 through 'their' NQFs? What is their currency in the labor market and/or for further learning?
- c) What is the profile and content of initial VET qualifications – expressed in terms of learning outcomes – assigned to EQF levels 3 and 4? What is the role of theoretical knowledge? How is/are competence/s defined?

⁽¹⁷⁾ Austria, Belgium (Flanders and Wallonia), Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Slovenia, Sweden, Switzerland and the United Kingdom (England, Scotland and Wales).

⁽¹⁸⁾ qualification type is a group or cluster of qualifications within a country that share specific characteristics, for example in terms of subsystem they belong to, legal regulations and regulatory body, general educational objectives as well as duration of related programmes, access requirements or level of labour market entry. Within a qualification type, there can be many different qualifications with regard to the content: the specific learning outcomes they include can be quite different because they are linked to different fields (such as different technical fields, social and health care, business).

- d) Which are the main differences between initial VET qualifications assigned to EQF level 3 compared to those assigned to EQF level 4 within a country and between countries?
- e) How have learning outcomes and 'best fit' approaches been applied in assigning initial VET qualifications to levels? Which other criteria have been used?
- f) What evidence and data countries have applied when assigning initial VET qualifications to these EQF levels e.g. linguistic comparison of learning outcomes, positions of graduates in the labor market, etc)
- g) Which are the main similarities and differences between initial VET qualifications in different countries linked to these EQF levels?

2.3 Description of methodology

The study will adopt a comparative and qualitative approach. It should be based both on secondary data analyses, taking into account existing research at international and national level, policy documents, qualifications standards/programs, referencing reports as well as on collecting and analysing new data. In continuation, the tasks and methodology are described.

2.3.1 Methodology

- Desk research

The study will map and analyse initial VET qualifications linked to EQF levels 3 and 4 based on national and international literature review, policy documents, VET qualifications standards / programs, research projects as well as on qualitative research methods. **At least three interviews per country** with stakeholders from education and labour market involved in the referencing process and development of initial VET qualifications will be conducted to gather important contextual information and validate analysis results; other means of collecting information will be proposed by the contractor. EQF referencing reports and research projects at national level will be taken into consideration.

- In-depth analyses of eight case studies

Eight (8) case studies will research key emerging issues from the comparative overview and analysis. The proposed research methodology should indicate some criteria for the selection of the eight case studies. The preliminary discussion on case studies to be examined will be made in the inception meeting and the final in the interim meeting with the agreement of Cedefop's project manager(s) responsible for this project.

- Research tools

The contractor is expected to design a robust analytical framework and research tools for the collection and analysis of data, in particular, for mapping and analysing initial VET qualifications and their levelling to the EQF. The contractor is invited to propose the means for carrying out in-depth case studies, including country visits and focus groups.

Networking with national stakeholders

The contractor is advised to assemble the team necessary to execute, manage and coordinate the study. Considering the complexity of the study, the contractor is advised to rely on a team of experts/consortia across different countries to carry out the analysis and validate the findings. In the different development stages, the contractor will be working in close collaboration with Cedefop's project manager(s) responsible for this project.

2.4 Reports

2.4.1 Reporting requirements

The contractor will submit all reports in English. All deliverables should be shared with Cedefop in the draft stages before they are delivered as final ones to Cedefop. Cedefop will provide comments to all deliverables. The final deliverables have to be drafted according to Cedefop's style manual.

a) An inception report is due **6 weeks** after the date of signature of the contract. It refines the methodology proposed in the tender, includes a first proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data, a list of key stakeholders and institutions to be contacted, etc.) as well as an updated work plan and timetable.

b) A 1st interim report is due **4 months** after the date of signature of the contract. It will refine, in agreement with Cedefop project manager(s), a draft analytical framework of the study; will include final draft of research tools (e.g. questionnaires/interviews grids, tools for the analysis of secondary data, a detailed list of key stakeholders and institutions to be contacted, preliminary bibliographic references, etc.), results of the pilot as well as an updated work plan and timetable. Cedefop will provide comments on this interim report. The contractor should address these comments, liaising closely with Cedefop's project manager.

c) The 2nd interim report is due **9 months** after the date of signature of the contract. This interim report will include:

- a robust analytical framework of the study
- an overview of the mapping of IVET qualifications types assigned to EQF levels 3 and 4 with intermediary finding including analysis of their functions, profile and learning outcomes
- an overview and analysis of procedures, tools and evidence used for assigning IVET qualifications – through the NQFs- to the EQF levels
- proposal for in-depth case studies to be carried out in the final stage of the study
- a short description of the methodology, including the final version of the tools for data collection and analysis.
- an indication of the quality assurance mechanisms put in place in relation to data collection and analysis
- a complete list of data sources, including bibliographical data, references of people and institutions
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study

Cedefop will provide comments on this interim report.

d) Final report

A draft final report will be submitted to Cedefop **15 months** and a final report within **16 months** of the date of signature. The final report will contain an executive summary, highlighting the main findings and possible to be published separately.

Cedefop will provide comments on the draft final report.

2.4.2 Proof-reading & editing in English of final report(s)

The selected Contractor shall ensure that the final report(s) as submitted to Cedefop has (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).

2.5 Meetings and Travel expenses

2.5.1 The Contractor (2 persons) will be requested to attend the following one-day meetings at Cedefop premises (in Thessaloniki and Brussels) with the project manager(s) responsible:

- A kick-off meeting (inception meeting) in Thessaloniki within three weeks after the signature of the contract to fine-tune the study methodology in view of the preparation of the inception report.
- A meeting a few days after the submission of the 2nd interim report, in order to discuss progress, intermediary findings, data collection tools and the way forward. This meeting will take place in Cedefop's premises in Brussels.
- A meeting immediately after the submission of the draft final report to discuss and improve the analysis and final outcomes of the study. This meeting will take place in Thessaloniki.

2.5.2 All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described above, have to be included in the Financial proposal (see table in point 5.4, item 2a and 2b respectively).

2.5.3 Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation to this tender procedure is only open to tenderers who are in a position to subscribe in full to the “**Declaration on honour on exclusion criteria and selection criteria**”, given in Annex C. All tenderers, all group (consortium) members (if any) and any subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) MUST provide the declaration on honour found in Annex C duly signed and dated.

3.1. Exclusion Criteria

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

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

3.2. Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed statements from those entities. Please note that natural persons (individuals, freelancers) are also considered ‘entities’ for this purpose.

3.2.1. Economic and Financial capacity

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

Requirement:

- The average annual turnover of the tenderer for the last three (2013, 2014, 2015) financial years in the field of research and comparative analysis of vocational education and training and/or labour market should be at least **300,000 €**.

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

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last three financial years in the field of research and comparative analysis of vocational education and training and/or labour market.

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

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

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, they will be required to justify the non-provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2. Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract.

They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements for Technical and professional capacity:

- Have performed at least **3** contracts performed in the past three **(3)** years (to have been concluded by the deadline of submission of offers) in the field of research and comparative analysis of vocational education and training and/or labour market. The required combined total value of these at least three (3) contracts should be at minimum **300,000 €**.
- The Tenderer's key experts, whose involvement will be instrumental for the implementation of the contract, must have the relevant to the subject of the contract profiles, knowledge and experience for the successful implementation of the contract.

Expert 1: Project leader

- A university degree;
- At least five (5) years' experience of leading and organising an international team of experts;
- At least five (5) years' experience of running European and/or international research projects together with a team of international experts;
- At least five (5) years of experience in comparative analysis of (vocational) education and training at European and/or international level;
- Knowledge of vocational education and training systems in Europe and learning outcomes issues (conceptual and practical) proven by at least three relevant publications or involvement in 3 international projects;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in "Language levels of the Common European Framework of Reference"¹⁹ (CEF))

Expert 2: Core project team members

Members of the core project team have a crucial role in implementing the contract; they must fulfil the following minimum requirements:

- A University degree;
- At least three (3) years' involvement in European and/or international research projects;
- At least three (3) years' experience working in comparative analysis of (vocational) education and training at European and/or international level;
- Knowledge of vocational education and training systems in Europe and learning outcomes issues (conceptual and practical) proven by at least two relevant publications or involvement in 2 international projects;
- Knowledge of empirical research methodologies and qualitative and quantitative data analysis, proven by involvement in at least one project;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)").

Expert 3: Country experts

These experts must fulfil the following requirements related to the education and training system of their country or a relevant area:

- A University degree;
- At least three (3) years of experience in policy analysis and/or comparative research in the fields of education, training and/or employment, proven by involvement in 1 project and/or publication;
- Relevant knowledge of the country's context, the education, training and qualifications systems/frameworks, VET qualifications, learning outcomes and labour market, proven by involvement in at least 2 relevant projects;
- Languages: Linguistic ability to communicate and draft in English (Level B2 as determined in "Language levels of the Common European Framework of Reference (CEF)").

¹⁹ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

Proofs / Evidences of Technical and professional capacity

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

- Brief company profile (**please fill-in Questionnaire 4 in Annex G**) to prove the ability, technical know-how, experience in the field areas of the study;
- List of at least **3** contracts performed in the past **three (3)** years in the field of research and comparative analysis of vocational education and training and/or labour market and with total amount of min. **300,000 €**, 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 in Annex G**);
- Detailed CV (Europass format (<http://europass.cedefop.europa.eu>) or similar CV) of the project leader and core project team members and a short summary (1 page) of the fulfilment of the above mentioned criteria for the country experts (**please fill-in Questionnaire 5 in Annex G**).

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC which can 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:

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

m

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 each of the three (3) 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 evaluation will be carried out on the basis of the following technical award criteria:

- **Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (40 points)**
 - Demonstration of an in-depth knowledge and understanding of the research issues related to referencing of initial VET qualifications – through NQFs - to the EQF, the roles/functions and profiles of IVET qualifications and how they link to the labour market **(15 points)**
 - Demonstration of an in-depth knowledge and understanding of the role played by the learning outcomes approaches in referencing initial VET qualifications to the EQF **(15 points)**
 - Demonstration of an in-depth knowledge and understanding of the challenges of transparency and comparability of initial VET qualifications **(10 points)**

- **Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (40 points)**
 - Relevance and soundness of the comparative analytical and methodological approach proposed for carrying out the tasks in the assignment, envisaged tools, steps and data sources (30 points);
 - Rationale and proposed criteria for in-depth case studies (10 points).
- **Award criterion 3 – The organisation and management arrangements (20 points)**
 - Allocation of tasks, type and degree of involvement of the proposed experts (10 points);
 - Project organisation and quality assurance mechanisms to guarantee successful and on-time delivery of the tasks as defined in the terms of reference (clarity, coherence and feasibility of the work programme and timetable) (10 points).

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 services proposed for performance of the contract.

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

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

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

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

For award criterion 1

- Discussion on the research issues related to referencing initial VET qualifications, their roles, functions and profiles linked – through NQFs - to the EQF levels 3 and 4.
- Discussion on the role played by the learning outcomes approach in referencing initial VET qualifications to the EQF.
- A reflection on challenges of transparency and comparability of initial VET qualifications.

For award criterion 2

- Detailed description of the analytical framework and research methodology, its strengths as well as its limitations.
- Discussion on the type of data required and tools used for collecting technical evidence as well as important contextual factors; identification of criteria for in-depth case studies.

For award criterion 3

- A detailed work plan illustrating intended organisation and management of the tasks and human resources.
- Description of deliverables including a clear timetable and an assessment of risks involved in carrying out the project. Description of quality assurance mechanisms for timely and high quality deliverables.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

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

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

5.3. Financial evaluation

Only tenders scoring in total **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 of the three award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer TFO**) in the Financial Offer 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)

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 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.

5.4. 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 Financial offer 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 2.4.2) should be included in item 2c) of the Financial Proposal.

Financial offer 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 two 1-day meetings in Thessaloniki and one 1-day meeting in Brussels - 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 2.4.2	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 (*not applicable for global price contract*). Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

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

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the “**Declaration on honour on exclusion criteria and selection criteria**” requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 6 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

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

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

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

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

Declaration on honour on exclusion criteria and selection criteria”

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

and completed and signed by an authorised representative of the tenderer (group leader in case of consortium, with indication of entity, name and function), but not by subcontractors.

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

Please Tick ✓ the boxes provided

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

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)