

FINANCE AND PROCUREMENT

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Thessaloniki, 20 August 2015

OPEN INVITATION TO TENDER

Developing Information Technologies and Labour Market Information in Lifelong Guidance

AO/DLE/PMDFON/ICT_and_LMI_in_Guidance/010/15

 REFERENCE: *Contract notice - 2015/S 160-293146 of 20/08/2015*

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

✓ that they have submitted an offer in time, and

✓ that they request Cedefop to confirm receipt of the e-mail or fax.

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

or

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

or

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

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

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

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

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

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

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

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

OPEN INVITATION TO TENDER CEDEFOP No: AO/DLE/PMDFON/ICT_and_LMI_in_Guidance/010/15 ‘Developing Information Technologies and Labour Market Information in Lifelong Guidance’ Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in section 6 of the attached Tender Specifications.

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

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

7.1 Contacts before the final date for submission of tenders:

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

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

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

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/en/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)	25/09/2015	17.00h
Last date on which clarifications are issued by Cedefop	< as soon as possible >	N/A
Deadline for submission of tenders (hand delivered)	05/10/2015	17.00h
Deadline for submission of tenders by post / courier	05/10/2015	N/A
Validity of the tenders	05/04/2016	N/A
Tender opening session	19/10/2015	11.00h
Estimated contract signature date	Mid-December 2015	

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of 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 (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:
 - the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm), or
 - the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).
15. All tenderers will be informed in writing of the results of this tender procedure.
16. Once Cedefop has opened the tender, the document shall become the property of Cedefop and it shall be treated confidentially.

17. You will be informed of the outcome of this procurement procedure by e-mail. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check it regularly.

Yours sincerely,

G. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DLE/PMDFON/ICT_and_LMI_in_Guidance/010/15

**‘Developing Information Technologies and Labour Market
Information in Lifelong Guidance’**

Tender Specifications

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Annex C:	Declaration on Exclusion Criteria
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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>

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

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽¹⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

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.

⁽¹⁾ Cedefop also works with Iceland and Norway.

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

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

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States. Cedefop is also finding out more about 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 Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

- Title of the contract: Developing information technologies and labour market information in lifelong guidance
- Short description of content of this contract:
The contractor will support the development of structured knowledge exchange between countries concerning information technologies (ICT) and labour market information (LMI) integration in lifelong guidance services. The contractor will be required to: 1) develop a comprehensive inventory of practices; 2) develop case studies on selected practices; 3) elaborate a handbook on transferability of practices; 4) validate and pilot the application of the inventory and the handbook; 5) enable the structured exchange of practices across distinct national contexts.
- Type of contract: Direct Service contract (research study)

1.2. Place of delivery or performance

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

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

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

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **600,000 EUR (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 **twenty four (24)** months.

1.7. Main terms of financing and payment

Payments will be made as follows:

- Pre-financing: 30% after signature of the contract and within 30 days of submission of invoice and at the conditions set out in the draft contract.
- First interim payment: 30% after submission of the final version of the first interim report, including the inventory of methods and practices and within 60 days of submission of invoice(s) and at the conditions set out in the draft contract.
- Second interim payment of the balance: 30% after submission of the final report, including the validated handbook and materials to support learning event for the corresponding work assignment, and within 60 days of submission of invoice(s) and at the conditions set out in the draft contract.
- Payment of the balance: after the completion of the peer learning event and the delivery of the detailed report of results of the event's sessions.

For further details please refer to the draft contract (annex B to the tender documents).

2. TERMS OF REFERENCE

2.1. Cedefop's work in Lifelong Guidance

Lifelong guidance has been a consistent concern of the Centre for over a decade. Cedefop has cooperated in mapping exercises of lifelong guidance systems since 2004 (OECD, 2004) and sustained continuing work in the support of lifelong guidance (LLG) systems across Europe. The Centre has developed research in what regards standards for guidance of professionals' competences (Cedefop, 2009) and published guiding principles (Cedefop, 2005) for the development of lifelong guidance systems.

In the context of its continued cooperation with the European Lifelong Guidance Policy Network (ELGPN), Cedefop has also made its expertise available to the network's activities. Recently, the Centre developed an internal consultation process to its experts over the draft European Guidelines for Lifelong Guidance Systems' Development, and provided structured feedback on the document, helping shape its final version. Further contributions have been made to systems' development (Cedefop, 2008a), and the improvement of cooperation between stakeholders (2008b).

Much of the work of the Centre has taken a thematic focus on the needs of youth (Cedefop, 2010), middle aged workers (Cedefop, 2008c) and learners, older people (Cedefop, 2015) as well as migrants (Cedefop, 2014). These studies have supported the organisation of peer-learning events in Cedefop, with the participation of policy makers, researchers and practitioners, which have enabled the exchange of practices, ideas and stimulated networking among peers.

2.2. Information technologies and labour market information in lifelong guidance

With this study Cedefop will initiate a cycle of intensive knowledge building and learning activities aimed at supporting the Member States in the development of the strategic capacity in the use of information technologies (ICT) and labour market information (LMI) for professional career guidance and counselling. The progress and need for further capacity development in ICT and in LMI have been consistently identified in the Centre's thematic studies on LLG for the last ten years as well as by other policy and academic sources (e.g. OECD, 2004; Watts, 2009; Bimrose, J. et al., 2011).

The EU is undergoing a turbulent process of economic readjustment with high levels of unemployment in many countries, a growth of at-risk situations and frequent phenomena of disengagement from education and training. This process requires, more than ever, that both career services' managers and practitioners can access a solid knowledge of global and local labour markets, effectively communicate over a range of media, reach individuals who have become marginalised via their social networks, as well as be able to co-construct career paths with their clients, making use of updated tools.

ICT complements and expands the current possibilities of careers services and dramatically increases the penetration of quality information both via the internet and mobile applications. To support the development of guidance services with high higher levels of citizen access to quality labour market information and careers development support, Cedefop is launching the current initiative. This study will provide support tools for the development of careers services' capacity,

addressing the structured exchange of practices and the development of managers and practitioners' skills in the integration of ICT and LMI in lifelong guidance.

Given the high complementarity of the development of ICT integration in careers services with the improvement of labour market information provision, these two issues will be jointly tackled. This study does not exhaust itself, nevertheless, in the complementarity of the two components. The specificities of ICT integration in guidance and of LMI development and usage are also specifically addressed.

2.2.1. ICT in Guidance: self-help and integrated services

ICT in guidance is becoming an increasingly important topic, frequently perceived through the multiplication of self-help services. Self-help services provided via websites have gained popularity and policy attention, providing careers information, self-assessment exercises and, occasionally, career training modules. In spite of their intrinsic value and popularity, these services are more adequate to individuals with a minimum level of digital literacy and autonomy in career decision. Individuals with moderate and weak ICT and career skills strongly benefit from the support of professional guidance practitioners. In certain contexts, the percentage of individuals of working age requiring individualised and more resource intensive methodologies (e.g. counselling) can reach 50%. Many individuals may also prefer to have professionally supported services, given their personality traits.

The role of ICT in guidance becomes particularly strategic when ICT is *integrated* in the work of career centres. In these cases, users can be supported in their use of ICT, or use them within face-to-face interventions. When supported by career centres, online services tend to offer a wider range of services, such as access to counsellors, career forums, professional networks and mentors, as well as more complex career training options. They also tend to offer a more synergic combination of distinct modes of delivery, which may include, for example, online information combined with telephone helplines or online chat.

Recent communication technologies (Web 2.0) have created new possibilities in career guidance and counselling services. The ability to gather users' data, track and filter content, establish collaborative online platforms and network with both practitioners and users, holds a rich potential for development. ICT can support face to face interaction when working with individuals or groups, as well as distance activities online, including real time interaction.

Activities which can be empowered by ICT include career development activities, such as assessment exercises and career plans; enabling access to information on careers, learning and job opportunities with diverse media; delivering and developing career training programmes; developing advocacy and networking to facilitate transitions to labour market and in training; establish feedback mechanisms; manage caseload and records; develop databases for research.

2.2.1.1. *Challenges to the integration of ICT in guidance*

In spite of their potential, the successful integration of ICT in careers services faces a number of important challenges:

- Developing the ICT skills and competences of practitioners and managers of career centres/services;
- Resourcing equipment and software;
- Guaranteeing sustained technical support;

- Managing the impact of innovation in the organisation; and
- Ensuring a successful engagement of the clients.

Many guidance practitioners have limited skills and competences as ICT managers and users and limited knowledge on how to fully exploit its possibilities. Frequently, practitioners' skills and competencies in ICT are considered secondary, and are poorly developed both in initial and continuing training (Cedefop, 2009; NICE, 2012; European Commission, 2014). Current training tends to be focused on "foundational" skills for guidance and counselling, generally on psychology. The support skills and competences (Cedefop, 2009) tend to be underdeveloped, restricting the possibility of practitioners fully exploring the potential of information technologies.

Practitioners also tend to oppose face-to-face practice to online practice, instead of facing them as complementary methods. ICT skills and competences are separate but strongly interrelated with generic career guidance skills and competences (Bimrose & Barnes, 2010) and thus must be analysed bearing in mind models and contexts of career development support. Ultimately, practitioners will need to adapt and learn how to translate their face-to-face knowledge to a new setting.

Managers, in turn, need to be prepared to facilitate the integration of ICT and manage the change process which ensues. Resistance to the changes created in the provision of service needs to be understood and overcome with the cooperation of both middle and top management responsible for the career guidance services. The financing of infrastructure requires budgetary commitment and the equipment and software acquired need to be updated and maintained, to assure the quality of service. Client engagement is not guaranteed and must be factored in as a variable for success. Services provided may require adjustments to specific target groups and client career skills development.

2.2.1.2. Research rationale and priorities for ICT in guidance

The experience of Member States in integrating ICT in career guidance and facing associated challenges to implementation is not homogeneous across the EU. For example, Scandinavian countries have had considerable investment in the development of the support to practitioner's skills in ICT as well as in the development of tools to support guidance activities. The specific know-how of a number of countries can be considerable, and other Member States could strongly benefit from knowledge sharing activities.

The potential developed and accumulated in some countries can be amassed, and the transfer of methodologies and practices promoted via careful analysis and structured peer learning. Knowledge exchange between countries needs to be supported by a solid database of information. This exchange also needs to be assisted by tools which can highlight the core transferable elements and provide a rationale for adaptation to local realities. To allow for successful adoption and diffusion of innovative practices at national level, practitioners also need to be able to develop adequate skills and competences and have access to consolidated, comprehensive sources of information on current practices.

The contractor is expected to collect detailed information concerning practices held in countries with wide experience in the integration of ICT with guidance and to propose a structure for knowledge sharing among Member States, which accounts for adaptation to national contexts. On this basis, the contractor is expected to develop all tasks prescribed in this call for tender, namely, an inventory of methodologies and practices, the development of selected case studies, a handbook to guide transferability of relevant practices, the development of training modules for

practitioners and managers and a set of learning activities for practitioners, managers and other national multipliers. The assigned tasks should, *at minimum*, provide support for the development of lifelong guidance services capacity in:

- The usage of social media in career guidance and counselling;
- Chat services and real-time distance counselling;
- Supporting the development and usage of e-portfolios;
- Making use of diversified *media* in career development activities;
- ICT in outreach strategies (should include app use).

The above areas represent the initial **research priorities** to be discussed and validated with a board of representatives (see task 1, in section 2.4.1, below).

2.2.2. LMI in Guidance: making use of demand and supply side information

Labour market information traditionally consists of descriptive and analytical data which reflect labour market structure, characteristics of employment in different sectors, occupations and geographical areas, such as vacancies, job requirements, hours worked and wage levels, as well as trends in demand for skills. This type of information, which reflects the needs and context of the demand side of the labour market, can also be informal, reflecting opinions, mouth to mouth information or the experience of people. In spite of not providing official information, these are frequently important sources of intelligence for job searchers and learners. Labour market intelligence is labour market information which is formatted and delivered in a way which meets the needs of specific groups of users, making it relevant, understandable and directly useful to them.

Besides demand side information, supply side information can be gathered concerning the characteristics of the labour force and of the aspiring labour force, the learners. People can be characterised according to their demographic characteristics, skills, aspirations and interests. Individuals can be characterised regarding their values, generating further insight on how they feel about work or specific professions, which may be important to understand the influence of culture. In general, successful matching of people to available vacancies can only be implemented with the support of clear and comprehensive assessment mechanisms integrated in careers services. Notably, a number of promising practices at this level are partially automated.

Guidance uses and produces LMI when:

- supporting the development of career management skills: interpretation and management of career information, development of job search techniques, etc.;
- supplying career information: creating awareness about occupations and work contexts, helping clients reflect on how they can use what they have learned in work environments, identify career prospects, indicating paths for skills' development, identifying education and training;
- gathering information: on local enterprises, job offers, on clients' skills, aspirations, expectations and intentions.

Labour market information and intelligence (LMI) are an integrating part of individual career planning. When planning, independently of their career decision making style, individuals collect data, classify it according to their personal notions and may or not use it to inform their career decisions. The work of counsellors is to help individuals not only access good data, but also to refine the personal understanding and usage they make of it. Ideally, the individual progressively

develops the necessary skills and attitudes to search for information autonomously, make judgements and use the right information to take critical decisions.

LMI can be delivered and gathered through ICT, besides its usage in traditional face-to-face guidance services. Although the issues pertaining to LMI development in guidance are, to a certain extent, different from the ones related to ICT integration, they are strongly interrelated. The tools to be developed for LMI usage in this study should, for that reason, build up on the results of the assignments on ICT. In spite of this complementarity, LMI capacity and skills constitute a specific set which require targeted development.

2.2.2.1. Challenges to the appropriate use of LMI in guidance

Career guidance and counselling services face a number of important challenges regarding the appropriate usage of LMI:

- Practitioners and careers service managers frequently lack the appropriate skills to identify, interpret and use quality LMI to produce careers information during their activities;
- Complementary ICT skills for software, web search and database usage are frequently underdeveloped;
- When promoting self-help tools, careers services frequently fail to assure that clients can develop appropriate ICT and LMI skills for autonomous usage;
- Generation of LMI by careers services is generally inexistent or very limited;
- When supply side information is gathered by careers services, secrecy and an ethical usage of information have to be guaranteed.

As in the case of ICT, LMI skills have traditionally played a minor role on practitioner's training. Careers services, in turn, are frequently ill equipped to provide useful LMI tools to practitioners, or to clients, to enable their autonomous usage of LMI sources. Informal sources of LMI tend to be neglected and this type of information not registered or used in public careers services. When implemented, careers information tends to only cover the supply side, with relatively weak characterisation of the demand side. Any attempt, in turn, of administratively improving local labour market adjustments is limited by weak LMI creation within careers services.

Another background issue which requires attention in system development is the low adaptation of LMI to individual needs. Individual queries tend to be very precise in their geographical, occupational and sectoral scope. While LMI needs to keep track of the global trends, it also needs to be shaped, analysed and delivered in a way which serves individual needs. This requires a minimum set of coordinated capacities within careers services, as well as the development of practitioner's skills regarding the adequate integration of LMI in the career guidance and counselling process (which may require some analysis and production of materials).

2.2.2.2. Research rationale and priorities for LMI in guidance

The contractor is expected, for the thematic area of LMI in lifelong guidance, to develop all tasks prescribed, namely, the inventory of methodologies and practices, the transferability handbook component on LMI, the development of training modules and develop learning activities for national multipliers. The contractor should depart from the results of the Cedefop study on "LMI in

lifelong guidance”², which will be available at the time of the signature of the service contract, to successfully complete the assigned tasks by:

- Using the documented case studies as a departure point for the elaboration of the inventory and the selection of the detailed practices to use in the transferability handbook and learning activities;
- Implementing the national adaptation of the practitioners and users’ toolkits as a support for the elaboration of training modules and of resource lists.

The assigned tasks should, *at minimum*, provide support for the development of lifelong guidance services capacity in:

- Using publicly available LMI databases (including EU sources);
- Generating usable LMI for practitioners and for users;
- Organising and using creative and informal LMI;
- Gathering and using local LMI (mainly on demand side);
- Generating and using LMI for matching.

The above areas represent the initial **research priorities** to be discussed and validated with a board of representatives (see task 1, in section 2.4.1, below). Despite the high complementarity of ICT and LMI development in lifelong guidance services, the contractor should address all the research priorities in both careers services’ development areas. LMI priorities should be fully addressed, **independently of being or not supported by intensive ICT usage**.

2.3. Aims and objectives

The aim of this study is to promote the development of a knowledge base and structured knowledge exchange in ICT and LMI usage in career guidance and counselling. This general aim is to be achieved by:

- Creating a comprehensive and accessible **knowledge base** of relevant practices and methodologies, which can be available to practitioners and managers, in the shape of an interactive EU-level **inventory**;
- Creating a supporting **handbook** for the development of structured **knowledge exchange and transfer** between countries concerning ICT and LMI practices in integrated lifelong guidance services;
- Enabling **structured exchange of good practices** aiming at adaptation across distinct institutional and cultural environments;
- Developing **training modules/learning** activities aimed at supporting national level multipliers (practitioners and/or managers) in the development of **transferable practitioners’ skills, competences and knowledge** in ICT and LMI related areas;
- Implementing and refining the **LMI toolkits** for practitioners and clients developed in the Cedefop’s study “LMI in lifelong guidance”³, guaranteeing their adaptation to specific national/local contexts.

² The on-going Cedefop’s study aims at analysing the role of labour market information (LMI) and intelligence in successful guidance and careers education. The main tasks to be undertaken are: 1) The production of a comparative review of strategies of LMI usage in guidance and careers education across the EU; 2) The production of a practitioners’ toolkit for successful usage of LMI in guidance and careers education activities, 3) The production of a users’ toolkit for successful usage of LMI in career planning.

2.4. Tasks to be developed

The following tasks will be requested of the contractor:

1. **Validate research priorities** on the development of a) ICT integration and b) LMI usage in career guidance and counselling;
2. Design and implementation of an **inventory of practices and methodologies** on a) the integration of ICT services and b) LMI usage in career guidance and counselling;
3. Development of selected **case studies** on innovative and high impact practices with potential for transferability;
4. Production of a **transferability handbook** based on the analysis on a literature review and case studies data. The handbook should provide: transferability assessment framework to support effective exchange of practices and methodologies; clear application examples based on the in-depth analysis of at least 25 exemplary practices;
5. Develop **training modules/competence development activities** for national multipliers – careers service managers and guidance practitioners – in ICT and LMI;
6. **Validate the handbook and modules** with selected partners (primarily Euroguidance and ELGPN representatives) in a workshop;
7. Implement and refine the **LMI toolkits** for practitioners and clients;
8. Identify and select national managers via the Euroguidance and ELGPN networks. Organise two **learning events** for national managers with structured knowledge exchange and the training of multipliers in the application of the handbook, inventory and training modules.

2.4.1. Task 1 – Validation of research priorities on the development of ICT and LMI usage in career guidance and counselling

Before the data collection stage, the research team will validate the research priorities for capacity development (see section 2.2) with a board of experts which should include Euroguidance representatives, ELGPN representatives and, at least, one independent expert with a track of relevant international experience and publications in the area. The board is expected to have a minimum of 10 and a maximum of 15 members. The validation activities should include an interim workshop. Any potential changes to the priorities assigned, resulting from the validation activity, will be discussed with Cedefop.

2.4.2. Task 2 – Inventory of practices and methodologies on ICT integration and LMI usage in careers services

The primary aim of the inventory is to provide a relevant knowledge base for guidance and counselling practitioners, as well as managers of careers services, concerning the current practices and methodologies in ICT and LMI usage in career guidance and counselling. The inventory should have EU-28 Member States coverage and include national or regional-level practices. The inventory should cover both practices aimed at supporting the work of professional career guidance practitioners and online self-help tools. It is important that the inventory contextualises identified practices in a general description of the national system, indicating how the practices fit into the national guidance system structures and strategies.

³ See footnote 2.

The data collection tasks to be developed are to be based primarily on desk research via theoretical sources, reports, evaluations and information requested to promoters via the contractor's network of contacts. The inventory should display a minimum of 56 practices. During the inventory stage a number of relevant case studies (up to 25) will be elected among the surveyed practices for a deeper data collection and analysis (see task 2).

The inventory must present practices which cover all the research priorities for ICT:

- The usage of social media in career guidance and counselling;
- Chat services and real-time distance counselling;
- Supporting the development and usage of e-portfolios;
- Making use of diversified *media* in career development activities;
- ICT in outreach strategies (tracking, engaging users, engaging employers);

And for LMI:

- Analysing and using publicly available LMI databases (including EU sources);
- Generating usable LMI for practitioners and for users;
- Developing and using creative LMI;
- Organising and using informal LMI;
- Gathering and using local LMI (mainly on demand side).

Given the clear purpose of linking the inventory to the support of the activities of practitioners, besides the management of careers services, the data collection and analysis will have a strong component dedicated to the description and analysis of **methodologies and tools** used in the identified practices.

2.4.3. Task 3 – Case studies on ICT and LMI at the service of professional career guidance

The main aim of the case studies is to highlight innovative, effective practices of successful integration of ICT and effective use of LMI in the support of career guidance and counselling. The case studies will allow for a minimum of 25 field visits which have two specific objectives:

- 1) To complement and comprehensively document the information concerning methodologies, tools and skills of professionals, already collected during the inventory stage;
- 2) to clarify aspects related to the implementation of the selected successful innovative practices taking into account contextual conditions.

The elected ICT case studies (with a national or regional scope) will:

- Be representative of the agreed research priorities for ICT integration in professional career guidance in counselling;
- Address innovative practices in which ICT services are integrated with the work of career centres;
- Be documented as highly effective, with clear positive impact over quality of service and user related outcomes;
- Be potentially transferable and adaptable to other contexts.

The elected LMI case studies (with a national or regional scope) will:

- Be representative of the agreed research priorities for LMI usage in career guidance and counselling;
- Illustrate effective usage of high quality LMI within career guidance and counselling processes;
- Be documented as highly effective, with clear positive impact over quality of service;
- Be potentially transferable and adaptable to other contexts.

The case studies should provide the necessary information to elaborate the reflection on transferability of practices and the examples to be integrated in the handbook. For that reason the cases should primarily collect information on contextual factors, barriers to implementation and strategies developed to overcome them. The following factors will *necessarily* be well documented and analysed:

- **Policy context**, including existence of legal, regulatory or programmatic framework for implementation and existence of political endorsement;
- The **institutional context**, with clear description of the management structure, responsibilities and accountability schemes;
- **Financing** of the practice, which should clearly indicate costs, funding sources, strategy and financial management scheme.
- **Stakeholder engagement**, which must identify engaged stakeholders, strategy for engagement, level and content of responsibilities and role of collective structures and individual brokers;
- **Technological requirements** and characteristics of the systems, including the implications for local services and infrastructures. Existence of associated technical training of staff (management and practitioners) must also be clearly described.
- **Social aspects** must be explicitly characterised, in what concerns age, socioeconomic, gender and cultural issues which conditioned/driven the development of the practices;
- Identification of major **success factors** and conditionalities;
- **Barriers** met by the implementations of the projects and strategies to overcome them.

The field visits should have an indicative duration of 2 days and be developed by a team of two researchers. The preparation stage of the case studies should already collect a large share of the necessary data. The researchers should gain access to relevant documentation, such as reports, monitoring data, evaluations, planning documents preferably **ahead of the field visit**. Any existing reports by national or international experts on the selected case should be analysed.

2.4.4. Task 4 – Handbook for transferability of practices in Lifelong Guidance

The primary purpose of the handbook will be to support structured knowledge exchange concerning identified activities, methods and tools, and analyse their transferability. The handbook will describe innovative practices integrated with the work of career centres, with proven results, identifying and analysing their essential components, with the support of examples from actual cases. The handbook should allow for national level managers to assess the transferability potential of pioneer practices and identify measures and adaptations necessary to successfully integrate the practices in their national context. The handbook should, in conjunction with the inventory, allow potential national/regional level promoters to respond to the following questions:

- What are the most relevant and effective integrated practices in ICT for professional career guidance and counselling?

- What are the most relevant and effective practices concerning the production and use of LMI in career guidance and counselling services?
- What are the most interesting practices in ICT and LMI for application in my country's context?
- Can these practices be transferred?
- How can these practices successfully be transferred and adapted to specific contexts?

The handbook should advise on how to develop a comparative perspective between the original context of the practice and the context of the adopting country. It should, at minimum, provide indications towards the assessment of transferability concerning:

- **Objectives and scope:** Does the practice address the same target groups? Can the general targets and objectives be the same?
- **Impacts:** Are the expected outcomes and impacts, the same? Is there a similar time frame associated with these impacts?
- **National/Regional/Local level:** Are the practices going to be implemented at the same geographical level? Does that imply re-scaling and changing responsibilities?
- **Characteristics:** How was the practice implemented? Which barriers and success factors existed? Are they the same and how can they be overcome?
- **Assessment:** Which characteristics have stronger impact in the adopter context and require a more energetic response?
- **Synthesis:** Identify main success factors, barriers and potential strategies. Create recommendations for adoption in distinct contexts.

The handbook should have separate sections by type of practice (typification of practices must be clear for practitioner interpretation and linked to research priorities) and the above listed elements should be considered for each type of practice. The advice provided should account for predictable variations in context regarding distinct resource levels, practitioners' competences, demographic contexts and institutional cultures. The objective of the advice provided is not to present ready-made answers, but it should provide sound rationale for reflexion on concrete challenges. Contextual information must also provide an insight on the structure of the national LLG system and the influence of adopted policy strategies.

The assessment of characteristics of the practice will likely be a very important component of this exercise. It should enable a reflection on issues such as: the scope and pace of adoption; the influence of established services/practices; the voluntary or compulsory nature of the practice; stakeholder engagement strategies; and possible needs in terms of quality assurance and information management.

2.4.5. Task 5 – Training modules/competence development activities

The contractor should create booklets composed by training modules/competence development activities for practitioners **and** guidance service managers, bearing in mind knowledge, competencies and skills necessary for the successful adoption of each practice. The indications for practitioners should depart from the assumption that practitioners have developed foundational competences in psychology, but may lack support skills and competencies in ICT and in LMI. Priority should be given to modules which develop easily transferable skills and competencies and which make use of tools created for the modules or publicly available.

The modules should be integrated with the handbook, but constitute an independent set, which can be easily used autonomously. The tools and activities proposed by each module should,

furthermore be available in a minimal separate package which can be easily translated and handed out in training sessions. The modules should follow this indicative structure:

- Short rationale for each module, with reference to theoretical framework;
- Expected learning outcomes for each activity and module;
- Module content, including work tools and prescribed activities;
- Indicative programme with ideal duration and structure of training;
- Activities in separate set for ease of translation;
- Bibliography;
- List of resources;
- Link to inventory/examples of practice.

2.4.6. Task 6 – Validate the handbook and training modules with selected partners

The handbook should be validated primarily with European Lifelong Guidance Policy Network (ELGPN) and Euroguidance representatives and with appointed representatives of the practices highlighted. The board constituted for the initial validation of priorities in Task 1 should serve as a basis for the validation board at this stage. Proposed changes to the draft handbook will be discussed with Cedefop. The contractor will organise a validation activity with the members of the board, to test the adequacy of the handbook and use its conclusions to refine its contents and structure. Activities to develop during the validation seminar can be based on a pilot workshop and/or a focus group.

2.4.7. Task 7- Implement and refine the LMI toolkits

The currently ongoing study on “LMI in lifelong guidance” will generate a blueprint-type of document for LMI toolkits for practitioners and clients. These toolkits will consist of two relatively short documents (5-6 pages each) which will provide information on which kind of LMI to use in diverse situations, as well as indications on information sources, self-training resources, services and basic analytical techniques which can be used. These documents should be available, at minimum, in every EU language, in a friendly pdf format.

The contractor is expected to guarantee the refinement and national implementation of these tools, by translating them and adapting them to context. It is expected that during the inventory stage, the contractor collects the necessary information on national sources of LMI and resources to support practitioners and clients development in the usage of LMI.

2.4.8. Task 8 – Organise structured peer learning events

The contractor will organise two peer learning events (PLEs) aimed at ensuring the correct application of the tools provided, namely the inventory and the handbook, and enable an initial exchange of practices between countries. The PLEs should be specialised on ICT and on LMI, to ensure sufficient thematic specificity. The primary targets of this event are public service managers at central level who can ensure diffusion of practices in the educational and employment sectors. The objectives of the events are to:

- Identify and present innovative successful practices;
- Familiarise participants with the tools provided and ensure minimum skill in their usage;
- Apply the tools to initiate the analysis of transferability of practices across contexts;

- Enable potential adopting countries to pose direct questions to pioneer countries on the implementation of practices;
- Establish cooperation space between EU countries aiming at future support to the transfer of practices;
- Familiarise national multipliers with training modules and encourage their adoption, adaptation and application in national level activities.

The PLEs should last for a minimum two days and provide presentations and workshop activities which allow the meet the above objectives. The workshop should include promoters of highlighted approaches and the potential adopters. A detailed account of the sessions is expected to be produced by the contractor.

2.5. Deliverables and timetable

Close communication between Cedefop and the research team will be held, in addition to the elements prescribed below, by this timetable.

The contractor is required to submit:

1) Draft inception report, within two (2) months after the date of signature of contract

The report should fine-tune the methodology proposed in the tender, including the methodology used to collect and analyse and structure the data of the inventory. Building on the technical proposal and taking into account first feedback by Cedefop's project manager, the report should provide in **approximately 25 pages** (plus annexes) a refined discussion **of the two sets** of priority areas and practices to be researched (ICT and LMI), supported by a solid theoretical background and a review of secondary sources. The report should present an initial indication of potential cases to be highlighted as representative practices to study in the case studies. An annex providing the revised and detailed timetable and work plan will complement the methodology. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

2) Progress report, within five (5) months of the date of signature of the contract

In addition to regular communication with Cedefop, concerning the progress of the work to be done, the contractor is expected to present a progress report concerning the elaboration of the inventory. The report should provide a clear account of the information collected up to the moment and an update on activities carried out, planned and foreseen difficulties with the development of the work plan. The report should also provide a proposal for case studies to be further developed. Cedefop will provide comments on the progress report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

3) First interim report, within ten (10) months of the date of signature of the contract

The report should include:

- The final draft of the inventory on ICT and LMI practices in career guidance and counselling, comprehending the practice fiches agreed with the contractor;
- An Excel file containing all of the practice fiches in a friendly format for database management;
- The final list of case studies to be developed;
- A refined methodology of the case studies, reviewed according to information collected in the inventory stage and the reflexion towards the handbook production.

- A revised proposal for the handbook structure, reflecting the analysis of the inventory data;
- A revised version of the training modules/competence development activities structure, contents to include and a concrete indication of the diverse media supports to implement them. A working example should be presented to Cedefop at this stage;
- A check list of components and critical factors to highlight in the case studies.

Cedefop will provide comments on the progress report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

4) Second interim report, within fifteen (15) months of the date of signature of the contract

The report should include:

- All case studies, completed and with respective full description and analysis;
- An initial version of the handbook, presenting the rationale and the first draft of the section "Practices and examples" (see Section 2.4.4) for each practice;
- An initial version of the training modules/competence development activities, addressing all components requested in section 2.4.5;
- A first draft of the English version of the LMI toolkits in accordance with the blueprint supplied by Cedefop;
- A detailed proposal of the handbook, training modules and validation activities to be performed.

Cedefop will provide comments on the interim report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

5) Draft final report within twenty months (20) of the date of signature of the contract and a final report within twenty-two months (22) of the date of signature, following the guidelines provided in these Technical Specifications.

The report should include:

- The final draft of the handbook on transferability of ICT and of LMI practices in career guidance and counselling, including the list of components and factors and the training modules indications;
- The final version of the handbook should include a discussion of general success factors, barriers and strategies to overcome them, concerning ICT and LMI practices in career guidance, and provide key messages for policy makers to enable their diffusion and successful adoption;
- The final version of the training modules/competence development activities, addressing all components requested in section 2.4.5;
- The final version of the LMI toolkits and translation of corresponding contents to all EU languages;
- A description of the validation activities, with an account of the main inputs provided and modifications introduced to the handbook as a result;
- A draft planning of the peer learning events, including a provisional list of participants.

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

The contractor shall submit all deliverables in English, in hard copy and electronic format. Figures and tables should be delivered in Excel or in Word, as appropriate. Excel charts should include the data tables that allow modifying or reproducing the charts, if needed. The full data set of the interviewed should also be submitted in an agreed electronic format. The electronic versions should fully correspond to the hard copies.

Layout and formatting should follow the Cedefop style manual (see Annex H of the Tender Specifications).

The selected Contractor shall ensure that the final report(s) 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).

2.6. Scheduled meetings and travel expenses

1. The contractor (3 persons) will be requested to attend five (5) one-day meetings in Cedefop's premises (Thessaloniki, Greece) with Cedefop experts in lifelong guidance and other relevant issues:

- An inception meeting around 2,5 months after the date of the signature of the contract to discuss the draft inception report (which is due 2 months after the date of the signature of the contract);
- A progress meeting around 6 months after the signature of the contract, to discuss the progress towards the completion of the inventories and the setup of case-studies;
- the first interim meeting around 10-11 months after the date of signature of the contract to discuss the first draft interim report;
- the second interim meeting around 15-16 months after the date of signature of the contract to discuss second draft interim report. The handbook validation activities will also be discussed;
- a final meeting around 20-21 months after the date of the signature of the contract to discuss the draft final report. The organisation of the final peer learning event will also be discussed in this meeting.

2. The contractor is also expected to organise a meeting for the validation of the research priorities **(10-15 people)**, a meeting for the validation of the handbook **(10-15 people)** and two peer learning events. Each validation event should have a minimum duration of **one (1) day** and the peer learning events will have a minimum duration of **two (2) days each**.

3. All costs incurred related to the **five** above noted meetings, to the **two** validation meetings (research priorities and handbook) as well as to the **peer learning event** including any travel-accommodation **for the team members** and logistics (venue rent, equipment, catering, etc.) have to be included in the financial offer (see point 5.4 Price schedule table, **item 2a**).

4. All costs incurred related to the two validation meetings (research priorities and handbook) **for the external national experts and the independent international experts**, including any applicable fees, invitations, costs of travel and accommodation, have to be included in the financial offer (see point 5.4 Price schedule table, **item 2d**).

5. **Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the Technical Specifications have also to be included in the financial offer (see point 5.4, item 2b in Price Schedule table).**

6. Any extra travel expenses, besides those mentioned above, that might be needed to perform the tasks related to the contract upon the request of Cedefop, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the Draft Contract in Annex B). This may include participating in an event to validate and/or disseminate the results, tools and recommendations from the study.

2.7. References and recommended readings

2.7.1. References

Bimrose, J.; Barnes, S.-A. (2010), *Labour Market Information (LMI), Information Communications and Technologies (ICT) and Information, Advice and Guidance (IAG): The way forward?* UKCES, United Kingdom

www.opf.fi/download/145632_lmi-ict-and-iag.pdf

Bimrose, J., Hughes, D., & Barnes, S.-A. (2011), *Integrating new technologies into careers practice: Extending the knowledge base*. London: UK Commission for Employment and Skills.

Cedefop (2005), *Improving lifelong guidance policies and systems*, Luxembourg: Publications Office of the European Union

Cedefop (2008a), *From policy to practice – A systemic change to lifelong guidance in Europe*, Luxembourg: Publications Office of the European Union

Cedefop (2008b), *Establishing and developing national lifelong guidance policy forums*, Luxembourg: Publications Office of the European Union

Cedefop (2008c), *Career development at work - A review of career guidance to support people in employment*, Luxembourg: Publications Office of the European Union

Cedefop (2009), *Professionalising career guidance*, Luxembourg: Publications Office of the European Union

Cedefop (2014), *Valuing diversity: guidance for the labour market integration of migrants*, Luxembourg: Publications Office of the European Union

Cedefop (2015), *Increasing the value of age. Guidance in employers' age management strategies*, Luxembourg: Publications Office of the European Union

Organisation for Economic Co-operation and Development (OECD) (2004), *Career guidance and public policy: Bridging the gap*. Paris: OECD

European Commission (2014), *European reference competence profile for PES and EURES counsellors*, Brussels

Jaana Kettunen, James P. Sampson Jr. & Raimo Vuorinen (2015), Career practitioners' conceptions of competency for social media in career services, *British Journal of Guidance & Counselling*, 43:1, 43-56, DOI: 10.1080/03069885.2014.939945

Network for Innovation in Career Guidance and Counselling in Europe (NICE) (2012), *NICE Handbook for the Academic Training of Career Guidance and Counselling Professionals*, Heidelberg University

OECD (2004), *Career Guidance: A Handbook for Policy Makers*. Paris: OECD/European Commission.

<http://www.oecd.org/education/innovation-education/34060761.pdf>

Watts, A. (2001), The role of information and communication technologies in integrated career information and guidance system. OECD

<http://www.oecd.org/edu/research/2698249.pdf>

Watts, A. (2009), Policy issues relating to the use of ICT in lifelong guidance. Paper presented to the Sixth European Conference on e-Guidance in Riga, Latvia, 17 September 2009

[http://www.forum-](http://www.forum-beratung.de/cms/upload/Veroeffentlichungen/Fachliteratur/Watts_ICT_in_LLG.pdf)

[beratung.de/cms/upload/Veroeffentlichungen/Fachliteratur/Watts_ICT_in_LLG.pdf](http://www.forum-beratung.de/cms/upload/Veroeffentlichungen/Fachliteratur/Watts_ICT_in_LLG.pdf)

2.7.2. Other recommended literature

Council of the European Union (2008), Resolution of the Council on better integrating lifelong guidance into lifelong learning strategies, Official Journal of the European Union (2008/C 319/02), 13 December 2008

Barnes, A. (2008) *Workforce development and the use of ICT in delivering career guidance in the UK*. Publication available at

http://www.nicec.org/nicec_workforce_dev_ict_career_guidance.pdf

This report provides an overview of the use of ICT in career guidance and on the provision of training and development in ICT skills for guidance practitioners. It was elaborated as a support to pilot training of practitioners in the UK resulting from the Commission financed European project ICT Skills 2. ICT Skills 2 mapped the ICT based tasks of guidance counsellors and was run for 2 years in 4 EU countries.

Pyle, K. R. (2000). Career counselling in an information age: The promise of “high touch” in a “high tech” age. *Career Planning and Adult Development Journal*, 16(3), 7–29.

Reflection on changing career counsellors’ perceptions, modes of thinking and job contents in the information age. Outlines competencies for high-tech counselling and describes a model group counselling program involving technology.

Job Tribu (2012), *Good practices in the use of ICT in providing guidance and counselling*, Bucharest: Institute for Educational Sciences

Job Tribu (2013), *New technologies for career guidance and mobility, Handbook for practitioners*. Siena: Industria Grafica Pistolesi

Job Tribu is a PROGRESS financed project, which provides a relevant survey of ICT practices in career guidance and counselling and a handbook for practitioners on how to develop ICT resources and make use of freeware and shareware in their career support activities. The publications have a strong emphasis on the use of e-portfolios, self-guidance and dynamic CV building. The handbook provides useful reflections on integrating old career services with ICT innovations and consequences for practitioner training. These publications are available at <http://www.jobtribu.eu/documents.html>

Unesco, *Module 8, Guidance and Counselling Programme Development, Botswana*.
http://www.unesco.org/education/mebam/module_8.pdf

This Unesco online publication provides useful ideas on how to devise and implement training modules for counsellors and career educators in contexts where the methods and practices introduced constitute an innovation. Although primarily devised for basic capacity development in career guidance services in Botswana (other modules were also made for other countries), it provides general insight on how to generate a union between policy initiative and support to practice.

National Career Development Association (1991), *Guidelines for the preparation and evaluation of career and occupational informational literature*, NCDA, USA
<http://www.ncda.org/aws/NCDA/pt/sp/guidelines>

Forum of Labour Market Ministers (2012), *Career and Labour Market Information Service Delivery Guidelines*, Forum of Labour Market Ministers, Canada
<http://www.flmm-lmi.org/CMFiles/Publications/whatnew/LMI-Service-Guidelines-ENG-2.02.pdf>

Hiebert, Bryan et al., *Using Labour Market Information in the Field: A Snapshot of Current Practices*. Canadian Career Development Foundation

Murray, Alexander (2010), *The state of knowledge and impact of labour market information: a survey of international evidence*, Centre for the Study of Living Standards. Ontario: Canada

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

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

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

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

3.2. Selection criteria

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

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

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

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

3.2.1. Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer for the last three financial years concerning the type of services covered in this call for tenders should be at least **300,000 €**.

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

- Signed Statement (Please fill-in and sign your Statement in **Questionnaire 2 of Annex G**) of the tenderer's turnover for the last **three** financial years concerning the type of services similar in nature to those making the subject of this call for tenders.

In case of a consortium (grouping) or subcontracting each member of the consortium and all 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, he or she will be required to justify the non-provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2. Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract. They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements:

- The tenderer must have a **minimum of three (3) years' experience in comparative research at international level** in the development, design and implementation of studies in career guidance and related areas, having performed contracts with a **total** minimum contract value of **900.000,00 Euro** (invoiced financial value) during the last **three (3)** years.
- The tenderer's proposed team of experts must have the profiles, knowledge and experience relevant to the subject of the study for the successful implementation of the contract. In particular, the following requirements are mandatory:

For the proposed Team Leader:

- A university degree in social science;
- Minimum of five (5) years of individual professional research experience in total, in career guidance and counselling;
- Minimum of five (5) years of individual experience in managing research projects, of which minimum of three (3) years of individual experience in managing comparative research at European or international level;
- 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").

At least one of the members of the core research team should be a **senior researcher** with the following requirements:

- A university degree (minimum M.A. level or equivalent) in social science, education or guidance.
- Minimum of five (5) years of individual experience in qualitative research in lifelong guidance or related fields;
- Minimum of three (3) years of individual experience in direct application of field research methodologies, such as case study methodologies, interviews, ethnographic methods.

The core research team must have a minimum of three members and jointly possess:

- Previous experience in transferability and knowledge exchange projects and with transferability methodologies, within the last 10 years;
- Previous experience in collaborating with national level policy officials, preferably in guidance services, within the last 10 years;
- A minimum of three (3) years of experience in researching the role of ICT and LMI career guidance and counselling.

The core research team must also jointly possess the following individual experience:

- A minimum of five (5) years of individual experience in qualitative research, including case study methodology in a relevant field of research (guidance, ICT, LMI, training and education);
- Minimum of five (5) years of individual experience in organisation of seminars, workshops, focus groups;
- Minimum of five years (5) of individual experience in elaborating and delivering training for career development practitioners and managers of career services.

For all of the members of the core research team with drafting tasks:

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

Proofs / Evidences of Technical and professional capacity

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

- Brief **presentation** of the tenderer, demonstrating the required experience in the field (**Questionnaire 4 in Annex G**);
- List of **contracts performed** in the past three (3) years in the development, design and implementation of studies in career guidance and related areas, describing the contracting authorities, the subjects, the dates, the amounts and the percentage performed by the tenderer (**Questionnaire 3 in Annex G**);
- The **Europass curriculum vitae** format (<http://europass.cedefop.europa.eu>) or similar format shall be filled in, by each person involved in the execution of the tasks foreseen in the tender. CVs must clearly specify at the top the role of the expert in the team (Team Leader, Senior Expert, and Junior Expert). **Each CV must include brief Annex** synthesising information aimed at demonstrating the professional capacity of the team

member as above requested. In particular the Annex should 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 the member's level of competence in English. The CV of the Team leader and of the remaining team members should also include a list of publications relevant to the subject of the call.

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

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

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

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

4.1. Joint Offers/ Groupings (Consortia)

- Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.
- Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.
- If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.
- A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.
- Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).
- Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.
- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop

the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

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

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers.

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

5. AWARD OF THE CONTRACT

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

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

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

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

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 each of the three 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 – indications in italics below refer to the framework template below (see 5.2).

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

Award criteria – Evaluation grid	Maximum number of points
1) The level of understanding of the nature of the assignment, its context and results to be achieved	10
Level of understanding of fundamental issues, concepts and dimensions of analysis related to the integration of ICT and of the usage of LMI in career guidance and counselling. Discussion of interrelations and specificities of both themes. Discussion of assignments and research priorities.	10
2) METHODS AND TOOLS	70

2.1. Inventory methodology Appropriateness of the methodology used to gather, analyse and organise the data of the inventory of practices, including the proposed structure as well as proposals for the future management and updating of the resulting database.	10
2.2 Case study methodology Appropriateness of the methodology proposed for the development of case studies, including the preparation stage, methods and tools to be used during the field visit and data analysis.	10
2.3 Handbook and training modules development strategy Appropriateness of the strategy for the development and use of the handbook on transferability of practices and the connected training modules/competence development activities, including a clear indication of handbook structure and contents as well as proposals for development of the training modules' indications.	30
2.4 LMI toolkits implementation strategy Appropriateness of strategy to engage national partners in the implementation of a LMI toolkit. Appropriateness of supports and delivery methods of toolkits to contribute to the mission of career support services. Appropriateness of methodology to translate to every EU language up to 12 pages of written contents.	10
2.5 Validation and peer learning event methodology Appropriateness of the methodology proposed for the validation of the research priorities, the handbook on transferability and the training modules. Quality of the methodology and structure of the peer learning events on transferability of ICT and of LMI practices in lifelong guidance	10
3) ORGANISATION, PROJECT MANAGEMENT AND STAFF	20
3.1. Project management, work organization and team of experts Allocation of tasks, type and degree of involvement of the proposed experts, with clear reference to each task to be developed. Demonstration of capacity to cover the 28 EU countries in terms of team members' allocation.	10
3.2. Quality assurance and project's workflow Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable).	5
3.3. Risk management Level of understanding and answers provided to the organisational and management challenges implied by the field work to be developed and measures to overcome these.	5
OVERALL TOTAL SCORE (Total Quality Value)	100

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

- do not reach a minimum of 50% of the possible score for each of the **three** award (evaluation) criteria, and
- obtain an overall total score (Total Quality value) of less than **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 include their technical proposal (envelope B) in one original and three hard copies and in a form of a read access secured CD. The content of the technical proposal in the hard copies and the one in the CD must be identical. In case of discrepancies between the hard copies and the CD, the hard copies shall take precedence.

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 organise his proposal in the way he considers most suitable to show his capacity to fulfil (comply in full to) all requirements outlined in the Terms of Reference.

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

For award criterion 1 – Understanding and methodology

- A synthetic discussion paper (max. 10 pages) of the subject, demonstrating in-depth understanding of the concepts, research priorities, assignments and objectives of the study. Coherence and relevance of research priorities should be discussed for both ICT and LMI.

For award criterion 2 – Methods and tools

- Comprehensive description of methodology to be used to select, gather, analyse and organise the data of the inventories of practices, including the proposed inventory structure, envisaged contents structure and proposals for the future management and updating of the resulting database. The proposal should also include a description of the strategy to implement to successfully collect all the required data.
- Comprehensive description of methodology to be used in the development of case studies, including the rationale for the selection of case studies, the preparation stage and the methods and tools to be used during the field visit and data analysis. The link between the case studies exercise and the production of the handbook should be explicitly discussed.
- Detailed description of the strategy for the development of the handbooks on transferability of practices, including an indicative structure and the usage of the inventories and case studies data, as well as the coordination with the validation stages and proposals for the improvement of its structure and contents. Description of modules and/or proposed competence development activities. Description of proposed training materials, technical platforms, training and learning strategies.

- Detailed description of general strategy to engage national partners in the implementation of a LMI toolkit. Description of proposed pedagogical tools, materials and delivery methods of toolkits. Description of methodology to translate to every EU language up to 12 pages of written contents. Description should depart from assumption that toolkits will consist of two relatively short documents (5-6 pages each) which will provide information on which kind of LMI to use in diverse situations, as well as indications on information sources, self-training resources, services and basic analytical techniques which can be used.
- Comprehensive description of the methodology proposed for the initial validation of the research priorities and for the validation of the handbook on transferability. The description must present the two validation stages separately, propose a typology of participants as well as tools and methods to implement in each of the events. The consistency between both validation stages should be discussed. There should be a description of the methodology to adopt in the peer learning event, including a description of the activities to develop, the role of participants, the case studies and the appropriateness of the proposed methods to ensure correct usage of the handbook and the inventory.

For award criterion 3 - Organisation, project management and team of experts

- Detailed work plan illustrating intended organisation, milestones and management of the task including:
 - detailed Gantt chart (or project planning) with all anticipated activities, tasks, milestones and deliverables
 - description of the necessary tasks (technical and organisational)
 - clear explanation of the role and extent of the team members' expertise and participation in the study and allocation of tasks, which should reflect capacity to access a network of national experts which can enable successful data collection in all EU countries;
- Description of measures to be undertaken to assure the coordination, timeliness and quality of the work and deliverables at each stage;
- Prior assessment of the field research challenges implied by the assignment and measures to overcome them.

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.

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 have their financial proposal evaluated. 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.
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 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 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 / Financial Scenario

The Financial Proposal (Financial Scenario) 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.

Price schedule table

1)	Names / positions of the Experts /Service	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 all meetings for the team members - see point 2.6, § 3	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 2.6, § 5	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 2.5	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
	2d) Attending two validation meetings for the national experts and independent international experts – see point 2.6, § 4	Number of Units	Unit price (EUR)	Amount (EUR) for meetings
Subtotal 2 (2a+2b+2c+2d)				
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.

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

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 4 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2
- a read access secured CD containing the submitted in paper form technical proposal

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

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

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

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

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

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

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

ANNEX G

Questionnaires 1-4

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

ANNEX H

Cedefop Style Manual

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

ANNEX I

Models of power of attorney

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

ANNEX J

Model of Letter of Intent for Subcontractor/s

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