

FINANCE AND PROCUREMENT

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OPEN INVITATION TO TENDER

PRODUCTION OF SKILLS SUPPLY AND DEMAND FORECASTS

AO/DSL/VKVET/Skills forecasts/001/16

REFERENCE: *Contract notice - 2016/S 034-054302 of 18/02/16*

Tender Specifications

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

✓ that they have submitted an offer in time, and

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

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

or

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

or

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

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

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

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

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

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

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

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

OPEN INVITATION TO TENDER
CEDEFOP No: AO/DSL/VKVET/Skills forecasts/001/16
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)	24/03/2016	17.00h
Last date on which clarifications are issued by Cedefop	29/03/2016	N/A
Deadline for submission of tenders (hand delivered)	04/04/2016	17.00h
Deadline for submission of tenders by post / courier	04/04/2016	N/A
Validity of the tenders	04/10/2016	N/A
Tender opening session	18/04/2016	11.00h
Estimated contract signature date	End of June 2016	

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

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

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

10. All costs incurred 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 an Order under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.
14. Your personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on
http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm).
15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.
16. You will be informed of the outcome of this procurement procedure by e-mail only. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Yours sincerely,

R. Martens
 Head of Department Resources and Support
 Attached: Tender Specifications

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

OPEN INVITATION TO TENDER

AO/DSL/VKVET/Skills forecasts/001/16

**PRODUCTION OF SKILLS SUPPLY AND DEMAND
FORECASTS**

Tender Specifications

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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 ⁽²⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

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

- **Supporting modernisation of VET systems**

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

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

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

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

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

⁽²⁾ Cedefop also works with Iceland and Norway.

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

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

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

Cedefop's information

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

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

1. OVERVIEW OF THIS TENDER PROCEDURE

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

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

1.1. Description and type of the contract

- a) Title of the contract: **Production of Skills Supply and Demand Forecasts**
- b) Short content: Cedefop's skills supply and demand forecasts are widely recognised and results feed into key EU policy and strategic documents. Since 2005, Cedefop has developed sound methodology producing reliable results for the whole EU. The main objective of this contract is to ensure the production of regular European skills supply and demand forecasts, consistent in scope and level of details with the previous releases.
- c) Type of contract: Framework service contract, whereby the services will be provided following the signature of Order forms throughout its validity. The number and content of Order Forms will depend on the needs of Cedefop.

The tasks foreseen under this contract will be performed by the Contractor upon signature of separate Order Forms issued by Cedefop for each work assignment. The content of each Order Form will be agreed with the Contractor and shall stipulate the tasks to be performed by the contractor, the deliverables, the timetable, the budget, the human resources/experts to be allocated and the reports to be presented including frequency of the meetings. The subject of order forms will be based on the needs of the Cedefop and achievements of the contractor.

The nature of framework contract implies that the implementation of each subsequent work assignment is conditional on the acceptance by Cedefop of the deliverables and approaches proposed by the Contractor in previous work assignments.

1.2. Place of delivery or performance

The tasks must be completed outside Cedefop in the Contractor's premises.

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

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

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **1,200,000 EUR** (one million two hundred thousand Euro **without VAT**) over a **4** year period. Tenderers should be aware that the information on volume is purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms that will be issued after the Framework Contract is signed may, in fact, not reach the a.m. estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Orders Forms.

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, shall have initial duration of one (1) year and will be automatically renewed up to three (3) times, each for an additional period of one (1) year, covering a total acquisition period of four (4) years (1+1+1+1).

1.7. Main terms of financing and payment

Three payments for each work assignment/order form are foreseen. Payments will be made as follows:

- **1st interim payment:** 30% after submission of an inception report as requested in each order form.
- **2nd Interim payment:** 30% after submission of an interim report as requested in each order form and within 60 days of submission of invoices and at the conditions set out in the draft contract.
- **Payment of the balance:** 40% after submission of a final report as requested in each order form and within 60 days of submission of invoices and at the conditions set out in the draft contract.

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

2. TERMS OF REFERENCE

2.1. Background information

Cedefop's work on the anticipation of skill needs is widely recognised and the results are used in key EU policy and strategic documents. Since 2005, the Agency has engaged in the production of regular pan-European forecast, offering comparable results across EU countries and projections of future skills supply and demand. Cedefop publishes the results and methodological achievements in the form of monothematic reports, briefing notes, research papers³ and online documents. Recently, Cedefop has also produced series of Country reports focussing on forecasting results in different EU Member States⁴. The full set of forecasting results are available through Cedefop's online platform as for general public and as for more expert users⁵. Moreover, Cedefop forecasting results are among the key set of data underpinning the EU Skills Panorama⁶.

Cedefop works on the anticipation of skill needs for about a decade. This is in line with an EU policy agenda that emphasises that sound labour market intelligence is important for the design of labour market and education policies and to improve the match between supply and demand in the EU. Despite some signs of economic recovery, Europe is still about to face several important challenges that will affect its labour market in the future.

Therefore regular forward-looking projections and assessments will continue to form part of a sound analysis of socio-economic and labour market trends and how they affect skill needs in the EU. Cedefop does not intend to replace forecasting and anticipation activities undertaken within the Member States. Instead, the Agency produces information suitable for cross country comparison and creation of EU policies.

2.2. Current state of affairs

Cedefop's works on the skills forecasting resulted in the development of a robust and recognised conceptual framework consisting of several interconnected models and modules. This structure enables continuous improvements and further development of particular elements. It also allows for changing of the input data as well as key assumptions or develops different alternative policy scenarios. The whole framework is built on publicly available and cross country comparable data available through official resources (e.g. Eurostat, DG ECFIN, OECD) to ensure overall consistency of results as well as cross country comparability⁷.

The uniqueness of Cedefop's approach is that it uses single methodology and harmonised data to provide forecasts for 33 countries⁸. The forecast of labour demand is produced for industrial sectors compatible with NACE rev 2, occupational groups based on two digit ISCO 08

³ For full list of Cedefop's forecasting publication visit:

<http://www.cedefop.europa.eu/en/events-and-projects/projects/forecasting-skill-demand-and-supply/publications>

⁴ Country reports for all 28 EU Member states are available here:

<http://www.cedefop.europa.eu/en/publications-and-resources/country-reports/skills-forecasts>

⁵ Cedefop results online for general public are available here:

<http://www.cedefop.europa.eu/en/events-and-projects/projects/forecasting-skill-demand-and-supply/data-visualisations>

Cedefop results for expert audience are available here (registration needed):

<http://www.cedefop.europa.eu/en/events-and-projects/projects/forecasting-skill-demand-and-supply/detailed-forecasting-data>

⁶ For more information on EU SP please visit the homepage:

<http://euskillspace.cedefop.europa.eu/>

⁷ The Cedefop methodological framework is described in details in:

<http://www.cedefop.europa.eu/en/publications-and-resources/publications/5525>

⁸ EU 28 Member States, Iceland, Norway, FYR of Macedonia, Switzerland, Turkey

classification and 3 broad qualification levels based on ISCED classification. The forecast of labour supply is disaggregated by 5 year age bands (starting from 15 - 19 to 65 and more) by gender and 3 broad qualification levels based on ISCED classification. The results also provide components to assess potential labour market imbalances through various indicators.

Cedefop's forecasts are driven by a multi-sectoral multi-country macroeconomic model. This element provides a set of consistent employment forecasts by economic sector and country. Cedefop forecasting framework was not designed to develop own multi-sectoral multi-country macroeconomic model. In contrast to other elements of the methodological framework which are the property of Cedefop, this particular element has been outsourced to an external contractor. To establish consistency with various EU initiatives, the short-term forecasting trends are standardly calibrated with the forecast of DG ECFIN.⁹

The results of the sectoral employment forecasts produced by multi-sectoral and multi-country model feed into the modules for calculation of employment trends by occupation and qualification. These modules (EDMOD and QMOD) are based on harmonized data from EU Labour Force Survey (EULFS). The EULFS data are further processed and cleaned to enable for construction sector – occupation or occupation – qualification matrixes which are inputs to EDMOD and QMOD. These modules are built using on sophisticated econometric methods which allow for introduction of dynamics to the different elements.

When looking at the total jobs opportunities in the occupation, the employment dynamics tells only a part of the story. In EU about nine out to ten jobs are available due to the need to replace those jobs for different reasons (such as retirement, mobility, death). In many cases, replacement demand is reason for many jobs available in occupations where general employment trends (expansion demand) are negative. Cedefop's modelling framework captures also this phenomenon throughout the replacement demand module (RDMOD). The results are dependent on quality of input data. The current estimates are based on cohort component method.

Current forecasts of skills supply are developed around Eurostat's population projection Europop 2013. In the Cedefop modelling framework the skills are measured by the highest formal qualification achieved by individuals. The module uses combined stock – flow approach to estimate population and labour force disaggregated by age and gender. The model takes into account dynamic labour market activity rates which are dependent on the economic activity, real wage, unemployment rate and benefit rates. Labour market participation as well as educational participation and attainment are considered as gender and age specific in our models.

The interactions between labour supply and demand by qualifications cannot be easily captured. There are significant numbers of jobs that are filled by individuals with different qualifications than initially required. There is a special module (BalMod) which confronts the demand and supply taking into consideration this issue. BalMod distributes disposable labour supply with certain qualification level to working places based on the assumptions of stable relative unemployment trends by qualifications. The results of BalMod are serving as a basis for estimates of imbalance indicators to assess potential skill mismatch across occupations.

Forecasting results and latest methodological achievements are always subject of a validation process by group of individual country experts (ICEs). Cedefop established a formal group of ICEs to support its forecasting activities in 2012. Experts (typically one per Country) were selected on the basis of a call for expression of interest according to their expertise in labour market analysis and forecasting. These experts represent a wide range of expertise including academics, labour market economists, econometricians and statisticians. Cedefop organises regular workshops to confront the research team with views of ICEs and obtain valuable feedback.

⁹ For more information visit: http://ec.europa.eu/economy_finance/eu/forecasts/index_en.htm

Forecasting is inevitably an ongoing process which is affected by everyday reality. There is a necessity to test the accuracy of methods used and to compare these with any available alternatives so as to increase the quality of the results. At the same time new data (reference period and level of details) are published by statistical authorities and new policy measures affecting education and training and the labour market are taken. This highlights the necessity of using the most up-to-date information. The close follow up of the DG ECFIN as well as other international organisation forecasts or population projections by Eurostat is therefore more than necessary.

2.3. Related projects

- Other Cedefop projects identifying skill needs ⁽¹⁰⁾
- The Skills panorama ⁽¹¹⁾.

2.4. Objective, purpose and expected results

2.4.1. Overall objective and purpose of the contract

The main purpose of the contract is to produce regular updates of forecasting results and relevant methodological instruments to assess the future labour market trends taking skills as a key parameter. These trends provide vital information to different labour market actors: employees, employers, students and parents, social partners, policy makers. This information allows supporting informed decisions and appropriate actions on the labour market. The forecast should act as an early warning mechanism with the aim of improving the interaction on the labour market and to avoid potential skill imbalances.

The contractor shall be requested to carry out and develop further the regular forecast for Europe, providing results in comparable size and scope with previous vintages of Cedefop forecasts. They shall also develop results for different alternative scenarios reflecting possible socio-economic developments and impact of different policies, as well as further analyses of results with special focus on cross country, cross sector/industry and cross occupation comparisons. Finally, the contractor might also be asked to fine-tune the modelling framework to achieve enhanced quality and reliability of the results.

2.4.2. Ownership of the multi-sectoral multi-country macroeconomic model

As described in the section 2.2, Cedefop's modelling framework uses an existing multi-sectoral multi-country macroeconomic model developed outside of a contract with Cedefop and subject to property rights¹². Cedefop does not intend to allocate any financial resources for the development of own commensurate macroeconomic model within the context of this contract. The possession by the tenderer or capacity to develop such underlying model is therefore a key technical requirement. All other elements of the modelling framework are owned by Cedefop and are free to be used by the future contractor..

The **underlying model** is requested to allow for successful implementation of the general modelling framework of Cedefop. The model **has to produce forecast** of key macroeconomic parameters with focus on employment trends. The employment trends have to be available on

⁽¹⁰⁾ More information on other Cedefop projects on Identifying skill needs is available on Cedefop webpage:

<http://www.cedefop.europa.eu/EN/identifying-skills-needs/index.aspx>

⁽¹¹⁾ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF>

¹² More information on underlying model currently used by Cedefop is available in Chapter 3 of the Cedefop research paper no. 25 – Skills supply and demand forecasts, Methodological framework

<http://www.cedefop.europa.eu/en/publications-and-resources/publications/5525>

NACE rev 2 compatible sectors at least similar to the level of detail achieved in the current Cedefop forecast. The results should be available for 28 EU Member states with possibility of further geographical extension¹³. The model should also enable the design and analysis of different scenarios reflecting various policy measures and alternative paths of socio-economic developments

In case the tenderer does not possess an underlying multi-sectoral multi-country macroeconomic model of the above requested quality, the tenderer must demonstrate the capacity to develop one within the first six months of the contract.

The demonstration of the capacity to develop such model will be considered as successful if:

- The tenderer possesses/ensures access to a model meeting **minimum requirements**. These minimum requirements are defined as multi-country and multi-sectoral (minimum 5 EU Member States, minimum 6 basic sectors compatible with NACE rev 2 – primary sector; manufacturing; construction, distribution, business services and non-marketed services).
- The tenderer submits supporting documents with a detailed description of the model, examples of policy documents based on outputs of the model and output files with the results produced by the modelling software (E-VIEWS, Stata, R, XLS etc.).
- The tenderer presents a detailed time plan with key milestones how to extend the current model to the one requested by Cedefop in the first six months of the contract.

2.4.3. Results to be achieved by the contractor

The results to be achieved by the contractor should correspond in size, scope and structure to current Cedefop forecasts. The forecasts should deliver results for all 28 EU Member States. The modelling system should be designed with a possibility to be further extended to Norway, Switzerland, Iceland, FYROM and Turkey upon agreement with Cedefop.

The forecast of skills supply and demand should be produced up to the year 2030 (outlook for 2035 will be requested towards the end of the contract). The results should be organised and provided at least in the following disaggregation:

Skills supply:

- 5(five) year age groups starting from 15 – 19 until 65+
- Gender
- 3 (three) broad level of formal qualification compatible with ISCED 2011

Skills demand:

- 2-digit NACE rev 2 sectors or compatible
- 2-digit ISCO 08 or compatible (aiming at 3 digit at the end of the contract)
- 3 (three) broad level of formal qualification compatible with ISCED 2011

Potential skills imbalances:

- Unemployment by country and qualification level
- Continue developing the imbalances indicators⁽¹⁴⁾

¹³ Current set of results cover for EU 28 + Iceland, Switzerland, Norway, Turkey and FYROM

⁽¹⁴⁾ More details on the imbalance indicators as well as other modelling developments are available under the link:

<http://www.cedefop.europa.eu/en/publications-and-resources/publications/5525>.

The results are required to be produced in two alternative scenarios - optimistic and pessimistic together with a baseline scenario describing the most likely development. These alternative scenarios should reflect different possible policy measures as well as different phases of global economic cycles. The detailed specifications and content of the scenarios are to be discussed and finalized with Cedefop in particular order forms. All results should be delivered in a form which it will be possible to distribute to a group of Individual country experts or uploaded into the Cedefop web portal¹⁵ or Skills panorama.

Detailed analyses of results interpreting and investigating various labour market developments are expected to be part of the deliverables as well. As the forecast provides a range of results, the detailed analysis of different occupations and sectors will be agreed with Cedefop in particular order forms. The contractor will be requested to ensure exchange of the information with Skills panorama experts and Cedefop's Skills analysis team. It will be also important to ensure adequate links between the forecasting outcomes and other Cedefop (or European) skill anticipation activities projects to ensure the full synergies.

2.5. Scope of the work

2.5.1. General description

The project will be organized in several consecutive or parallel order forms. The total value of all order forms will depend on the tasks requested by Cedefop and may not reach the maximum estimated value of the contract.

The first year work assignment (and first order form) will mainly focus on adopting the Cedefop methodology. Underlying model proposed by the contractor will be linked to Cedefop modelling framework. To ensure this smooth transition period, Cedefop will steer the exchange of the knowledge and cooperation between the current contractor and the successful tenderer. This transition period is expected to take place in the first six months of the contract. The full set of forecasting results compatible with previous Cedefop forecasts are expected to be produced and tested by the end of the first contractual year.

Work assignments in the following years will focus on yearly updates of the forecasts taking into consideration the latest macroeconomic data and most actual underlying assumptions. The contractor will also be asked to support the detailed analyses as well as online publication of the results. The analyses should utilize the wide range of results produced by the forecast, include other qualitative information and be focused on developments within countries, sectors or occupations. Work assignments may also include further development and improvement of Cedefop modelling methodology, i.e. various parts and modules of the framework.

All methodologic achievements and forecasting results will be subject to a validation process. At least one validation workshop per year should be organized with Cedefop's group of individual country experts to obtain validation of country specific results as well as feedback on any methodological developments. Workshops will be organized by the contractor (timing and content) in cooperation with Cedefop (administrative arrangements)..The individual country experts may be contacted also in the course of development process to ensure smooth development of tasks. The communication between the contractor and the country experts will be organized by Cedefop.

2.5.2. Tasks to be undertaken during the contract

The tasks are organised in following four key activities:

⁽¹⁵⁾ For more information visit <http://www.cedefop.europa.eu/EN/about-cedefop/projects/forecasting-skill-demand-and-supply/skills-forecasts.aspx>

- To produce regular updates of the Skills supply and demand forecasts
- To report on key results and methodological achievements
- To validate the results and methodological achievements throughout regular workshops
- To further develop the forecasting methodology and additional models/modules

All proposed activities have to produce reliable and cross country comparable outputs usable for broad dissemination and further analysis. All modelling improvements have to contribute to improvements of the quality and have to be applicable to Cedefop modelling framework at the latest by the end of the contract.

The activities of the potential Order forms will be organised according to the following key tasks:

- Produce regular updates of the Skills supply and demand forecasts:
 - At the beginning of the works to adjust and adopt the methodology to meet Cedefop standards (see section 2.3.4)
 - Systematic monitoring and update of all relevant data, closely follow international and European developments and revisions of methodologies, taxonomies and standards
 - Regular update of all necessary modelling instruments
 - Produce yearly updates of the forecasting results in the form of baseline scenario
 - At least every second year to produce two alternative scenarios to the baseline (optimistic + pessimistic)
 - Produce other ad hoc scenarios if required by Cedefop
 - Propose topics and issues suitable for further analysis
- Reports on results and methodological improvements,¹⁶
 - Produce at least one synthesis reports (structure agreed with Cedefop) on the forecasting results
 - Produce reports and briefing notes suitable for print or online publication
 - Assist Cedefop web portal and Skills panorama teams to ensure timely dissemination of forecasting results online
 - Produce reports related to methodological improvements, if any
 - Produce regular activity reports as agreed in individual order forms (see part 2.6)
- Validation of the results and methodological achievements
 - Contribute to organising regular workshops in cooperation with Cedefop and team of national experts
 - Participate in email exchanges with the network of national experts to ensure high level inputs in the process
 - Execute validation exercise on usability and robustness of the results with key stakeholders
 - Organise a validation conference on skills forecasting and skills anticipation
- Further development of Cedefop forecasting methodology and additional models

¹⁶ For different types of Cedefop publication on skills needs, please visit Cedefop website

[http://www.cedefop.europa.eu/en/publications-and-resources/publications?search=&year\[value\]\[year\]=&publication_type=All&theme=359&country=&language=All&items_per_page=20&sort_order=DESC](http://www.cedefop.europa.eu/en/publications-and-resources/publications?search=&year[value][year]=&publication_type=All&theme=359&country=&language=All&items_per_page=20&sort_order=DESC).

- Propose improvements on different models and modules of clear added-value and contributing to improving the robustness of results and reliability of developed scenarios within the 4-year timeframe of the contract
- Implement methodological improvements into Cedefop modelling framework.

2.6. Regular activity reports

The contractor will be required to submit regular activity reports for each phase of particular order form. The following activity reports are typically requested by Cedefop:

- A) **Inception report**, within 8 weeks after the date of signature of the order form.
- The inception report should present – after discussion with Cedefop – a refined version of the methodology proposed in the tender, including a draft proposal of research steps to be taken and first results of the literature review. It should also include a pre-selection of enterprises/sectors/countries for validation and discussion with Cedefop.
- B) **Interim report**, within 6 months of the date of signature of the order form. This interim report should include:
- Description of activities undertaken including detailed description of methods and tools used
 - Information on challenges and problems encountered or risks expected, solutions found or proposed and potential impact on preparation of final report
 - Preliminary findings
 - Proposed structure for presenting the final results / final report
- C) **Draft final report**, within 12 months and a final report within xx months of the date of signature of the order form. The final report will consist of thick descriptions of each case. The annex should include transcripts and summaries of interviews, notes of observations and visual media (photographs and video snap shots). The structure of the final report needs to be decided upon together with Cedefop.

Above mentioned timing and content of the reports is indicative and will be elaborated in detail in each order form. Cedefop will provide comments on the inception, interim and draft final reports within 45 days after receiving the report. The contractor should address those comments, liaising closely with Cedefop project managers within 30 days after receiving..

The reports must be written in English and submitted in electronic format allowing for text processing and editing. The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual (See Annex H). In the case of report contain the charts or pictures these are requested to be sent in separate files allowing for further processing and/or editing.

2.7. Meetings and travel expenses

The contractor will be required to attend meetings at Cedefop premises in Thessaloniki, Greece. As a general provision, three meetings have been foreseen for each order form (kick off meeting, interim meeting and final meeting). Given the scope, the nature and possible overlaps of the

foreseen tasks, the final number of the meetings will be agreed in each order form. The order forms will specify also who from the contractor's team should attend these meetings. Meeting dates will be decided in common agreement between Cedefop and the contractor.

All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described in point 2.5.2, have to be included in the financial offer (see point 5.3 and Annex H).

Any extra travel expenses not foreseen and budgeted in a specific order form but needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

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

3.1. Exclusion Criteria

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

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

3.2. Selection criteria

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

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

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

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

3.2.1. Economic and Financial capacity

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

Requirement:

- The average annual turnover of the tenderer for the last **three** 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 and 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 point 4.2 below) who are natural persons / freelancers, a tax declaration and tax clearance statement for the last three financial years will be requested.*

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

3.2.2. Technical and professional capacity

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

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

Requirements for Technical and professional capacity:

- At least one **(1)** contract performed in the past three **(3)** years on labour market forecasting or multi-country, cross sectoral comparative labour market analysis across EU Member States;
- Ownership of an underlying macroeconomic model producing forecast of key macroeconomic parameters with focus on employment trends. The model has to enable the design and implementation of different scenarios reflecting various policy measures and alternative socio-economic development paths. The employment trends similar to the level of detailed achieved by the current Cedefop forecast. The results are to be available for 28 EU Member states with possibility of further geographical extension ⁽¹⁷⁾ – see point 2.4.2.

⁽¹⁷⁾ More detailed information on underlying model is in chapter 3 of document Skills supply and demand for Europe: Methodological framework which is available under the link: <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5525>.

In case the tenderer does not possess an own / does not have access to underlying multi-sectoral multi-county macroeconomic model of requested quality, the tenderer must demonstrate capacity to develop one within the first six months of the contract.

- The Tenderer's core team, whose involvement will be instrumental for the implementation of the contract, must have the relevant profiles, knowledge and experience for the successful implementation of the contract.
 - **Project leader**
 - University degree in social sciences, economics or mathematics;
 - At least 10 years of professional experience in the field of labour market forecasting;
 - Experience with leading at least one EU-level project focused on forecasting and/or labour market analysis within the last five years;
 - Level of English should be at least C1 in accordance with of the Common European Framework of Reference for Languages.¹⁸
 - **Key experts (at least 2)**
 - Each key expert has to meet following criteria:
 - Hold a university degree in social sciences, economics, statistics, econometrics or mathematics;
 - At least 5 years of professional experience in the field of economic modelling and/or labour market analysis;
 - Must have been professionally involved in at least one international research project on forecasting and/or labour market analysis in the last five years;
 - Level of English should be at least C1 in accordance with of the Common European Framework of Reference for Languages.
 - The following expertise must be covered by the proposed group of key experts as a whole:
 - Labour market modelling and forecasting,
 - Development of the modelling tools,
 - Running forecasts and incorporating results of qualitative analysis into quantitative outputs,
 - Quantitative and qualitative analysis of labour market,
 - Drafting high level quality scientific articles and report on labour market analysis,
 - Understanding education, training, employment and other related policies at different levels (EU, Member States, regions) and their impact to the labour market,
 - Experience in developing socio-economic and policy scenario and scenario analysis,
 - Cross-country, cross-sectoral and cross-occupational analysis.
 - **Experts (at least 2)**
 - Each expert has to meet following criteria:
 - Hold a university degree in social sciences, economics, statistics, econometrics, mathematics;

¹⁸ <https://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

- At least 3 years of professional experience in the field of economic modelling and/or labour market and/or policy analysis;
- Level of English should be at least B2 in accordance with of the Common European Framework of Reference for Languages.
- The following expertise must be covered by the proposed group of experts as a whole:
 - Create, adjust and handle large scale datasets,
 - Run statistics, econometric and/or other quantitative analysis,
 - Design, build and program different forecasting models, modules and systems,
 - Create, design and develop baseline and alternative scenarios,
 - Interpret results and conduct quantitative and qualitative analysis,
 - Understand the functioning of economic systems and labour market in particular,
 - Cross-country, cross-sectoral and cross-occupational analysis.
- **Analyst-reporter/copy editor must possess:**
 - At least 3 years of professional experience in drafting, reporting, copy editing, and preparing texts for publication in English; proven by the list of publications in the last 3 years.
 - English:
 - Mother tongue /or
 - C2 in accordance with of the Common European Framework of Reference for Languages (attested by certificate)

Proofs / Evidences of Technical and professional capacity

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

- Brief company profile (**please fill-in Annex G**);
- List of contracts performed in the past **three (3)** years describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Annex G**);
- The **detailed CVs of the team members** (preferably in Europass format) who will be proposed to implement the contract (as specified above). The tenderer must provide at least the number of distinct CVs required for each profile. CVs of the proposed team members should clearly indicate and describe which work experiences are relevant for the fulfilment of the contract, and clearly present the linguistic abilities, in particular in English.
- To demonstrate ownership of / access to the **underlying multi-sectoral multi-country macroeconomic model of the requested quality** (see above criterion and also point 2.4.2):
 - In case of the tenderer or a member of the consortium **owns / has access to such model**, the tenderer is requested to submit supporting documents with detailed description of the model, policy document (report or article) based on outputs of this

- model (article or study) and example of the output files with the results as produced by the modelling software (E-VIEWS, Stata, R, XLS, etc.)
- In case the tenderer does **not possess / does not have access to such model**, the tenderer must demonstrate the capacity to develop one within the first six months of the contract, by:
 - Presenting the ownership of /access to a model meeting the **minimum requirement (as above and point 2.4.2)** by submitting supporting documents with a detailed description of the model, examples of policy documents based on outputs of the model and output files with the results produced by the modelling software (E-VIEWS, Stata, R, XLS etc.) and
 - Presenting a detailed time plan with key milestones on how to extend the current model to the one requested by Cedefop in the first six months of the contract.

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

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

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

4.1. Joint Offers/ Groupings (Consortia)

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

the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

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

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

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

Only in cases when:

- a Subcontractor undertakes between 10,01% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

the tenderer should submit with the offer:

1. the **“Declaration on honour on exclusion criteria and selection criteria”** (Annex C) filled-in and signed by the respective Subcontractor;
2. the 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

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

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

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

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

Whereby:

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

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

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to (60);

Y is the weighting for price (TFO) and for this tender procedure it is fixed to (40).

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 award (evaluation) criterion and in total a minimum of **70** out of 100 points (TQV) in the technical evaluation – see below).

5.1. Technical evaluation

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

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

- **Award criterion 1: The level of understanding of the nature of the assignment in the context and results to be achieved (total 15 points)**
 - The level of understanding of the policy relevance of the exercise in the context of the EU. The level of understanding of usability of Cedefop results by the individual Member States. (max 7 points)
 - The level of understanding of Cedefop's conceptual forecasting framework for the development of skills supply and demand forecast. (max 4 points)
 - Awareness of the scope and size of expected outcomes and Cedefop's main dissemination channels. (max 4 points)
- **Award criterion 2: Methods and work organisation including the detailed time plan, ways and means to involve the group of national experts ¹⁹(total 40 points)**
 - Congruence and reliability of the methodologies, techniques and tools proposed and the workflow to obtain reliable results in required size and scope. Understanding of the specificity and quality of the data used. (max 20 points)

¹⁹ More information on the Individual country experts is available in section 2.2

- Appropriateness of expected timing for different phases and activities including synchronisation with the DG ECFIN's forecasting process, LFS data release as well as timing and ways of involvement of the network of Cedefop's country experts into the process. (max 15 points)
- Coherent allocation of roles and responsibilities of different experts and members of the consortia or subcontractors (if applicable). (max 5 points)
- **Award criterion 3: Examples of written output based on forecasting data (total 20 points)**
 - Relevance and adequacy of the presentation of Cedefop's forecasting results into a short policy briefing (up to 6 pages).
- **Award criterion 4: Examples of data outputs (results for further dissemination) (total 10 points)**
 - Usefulness and user friendliness of the solution proposed for exchanging data (results) with Cedefop's network of country experts. This will be assessed by the following (2 points each):
 - Intuitiveness of navigation between indicators
 - Presentation of data in different types of aggregations
 - Ability to transfer outputs to other file types
 - Ability to create graphic outputs of the data
 - Size of files produced and proposed way of further distributions
- **Award criterion 5: Contract management and quality assurance (total 15 points)**
 - Relevance of management tools and processes to be used taking into account the specific characteristic of the project. (max 5 points)
 - Strategy to ensure back-ups and replacements of key members of the team throughout the duration of the contract.(max 5 points)
 - Risk management, providing clear indication of possible risks and risk mitigation. (max 5 points)

5.2. Technical proposal

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

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

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

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

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

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

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

For award criterion 1

Discussion of the subject demonstrating in-depth understanding of:

- Role and relevance of skills forecasting and anticipation for the EU policy agenda and for Member States,
- General principles of economic and labour market forecasting, strengths and limitations
- Different elements of Cedefop's methodological framework, Scope and size of the project and results to be achieved

For award criterion 2

- Description of proposed methodologies, techniques and tools including the data intended to be used for this project.
- Detailed description of the workflow to obtain reliable results in required size and scope. including detailed timing for different phases and activities and synchronisation with the key external input (such as the DG ECFIN's forecasts, release of LFS data release) Description of the ways and timing of involvement of the Cedefop's group of country experts into the process.
- Detailed description of roles and responsibilities of different experts and members of the consortium or subcontractors (if applicable)

For award criterion 3

- A sample document (Max. a 6 page policy briefing) to demonstrate ability to communicate Cedefop's forecasting results to Cedefop key stakeholders. The tenderer is free to choose topic and focus but must use Cedefop forecasting results available on <http://www.cedefop.europa.eu/en/events-and-projects/projects/forecasting-skill-demand-and-supply/data-visualisations>.

For award criterion 4

- A sample file(s) containing results based on the tenderer's current models. The tenderer may also propose solutions how the current sample files will be adjusted to a final shape that meets the needs of the contract.

For award criterion 5

- A description of all management tools and processes put in place to ensure the timeliness and high quality of achieved outcomes of the project taking into account its specific characteristics
- All Back-ups and means to identify adequate replacements of team members throughout the duration of the contract have to identified
- The offer must contain detail risk assessment section, providing clear indication of possible risks and adequate risk mitigation.

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the

information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

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

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

5.3. Financial evaluation

Only tenders scoring in total 70 points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will be admitted to the other evaluation stages.

The evaluation will be based on the weighted price per profile and unit travel costs (one person one meeting). The tenders are awarded points for the Price offered by using the following formula for each category:

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

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

Profile	Max points = Z
Category 1: Team leader	30
Category 2: Key Expert	20
Category 3: Expert	15
Category 4: Analyst-reporter/copy editor	15
Category 5: Administrative staff	10
Category 6: Unit travel costs	10
Total	100

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

Total Financial Score (TFS) will be calculated as a sum of all individual financial scores per category (points reached per category). The tender offering the lowest price for each of the costs categories will score the maximum number of points.

The points assigned per category reflect the importance in quality of the requested categories

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

$$\text{Financial score} = (\text{cheapest Financial Proposal} / \text{Financial Proposal of the tender considered}) * Y.$$

Where Y = price weighting (see the complete formula under point 5 above)

Information concerning price

- The prices quoted must be fixed and nor revisable for the first year of the contract. From the 2nd year onwards, Articles I.5.2 and II.20 of the Contract shall apply (see draft Framework Contract at Annex B).
- Prices must be quoted in EURO and include all expenses.
Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.

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

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

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

5.3.1. Evaluation of abnormally low prices

If any tender's price appears to be abnormally low in relation to the *services / supplies* offered, and in order to check if the tender can be considered valid, the evaluation committee will, before it may reject this tender, send a request for clarifications to ask for explanations on the components of the tender which it considers relevant to the presumed abnormally low price and shall verify those constituent elements taking account of the explanations received. If in that relation the tenderer cannot explain his price on the basis of the economy of the services or supplies offered, or the method used, or the technical solution chosen, or the exceptionally favourable conditions available to the tenderer, the tender will be rejected.

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

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

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

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

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

5.3.2. Financially unacceptable tenders

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

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

5.4. Financial Proposal

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

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

The financial proposal has to indicate the price per category of staff (profile) and unit travel costs (see sections 2.6 and 3.4) to carry out all the activities indicated in the terms of reference. The tenderers are requested to fill-in the following Price schedule table and present a detailed breakdown of the price offered.

Staff category (profile)	Unit price (EUR – person day)
Category 1: Team leader	
Category 2: Key Expert	
Category 3: Expert	
Category 4: Analyst-reporter/copy editor	
Category 5: Administrative staff	
Travel and meetings	
Category 6: Unit travel costs	

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

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the “**Declaration on honour on exclusion criteria and selection criteria**” requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 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 Framework Contract

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

ANNEX C

“Declaration on honour on exclusion criteria and selection criteria”

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

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

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

(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)