

FINANCE AND PROCUREMENT

 DRS/PRO/CALU/RB(2018)/01178
 Thessaloniki, 18/06/2018

OPEN INVITATION TO TENDER

Provision of services related to skills data and intelligence

AO/DSL/AZU/Skillsdata&Intelligence/004/18

 REFERENCE: *Contract notice 2018/S 114-258474 of 16/06/18*

Dear Sir/Madam,

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

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

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

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

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

Important:

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

Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu)

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

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

or

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

or

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

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

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

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

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

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

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

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

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

OPEN INVITATION TO TENDER <i>CEDEFOP No: AO/DSL/AZU/Skillsdata&Intelligence/004/18</i> <i>“Provision of services related to skills data and intelligence”</i> Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

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

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

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

7.1 Contacts before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the tender documents. Any request for additional information must be made in writing by e-mail (C4T-services@cedefop.europa.eu).

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

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

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

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

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/en/about-cedefop/public-procurement>) **Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

7.2 Contacts after the final date for submission of tenders and before opening:

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.
- Tenderers are not allowed to amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

7.3 Contacts after the opening of tenders:

- Tenderers should not contact Cedefop on their own initiative at that stage.
- If clarification on the compliance with the Eligibility and/or Selection Criteria is required or if obvious clerical errors in the tender need to be corrected Cedefop may contact tenderer/s in writing to obtain further clarification or documents on specific points of the tender or to correct obvious clerical errors.
- If the necessary information and/or supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification if this might alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. Tenderers must not modify their tender or add any new elements to it. The reply must therefore make clear reference to the relevant information already present in the file. This will serve solely the purpose to provide the Evaluation Committee with a clarification regarding the technical proposal provided the terms of the tender are not modified as a result.
- In regards to possible clarifications on obvious clerical errors in the Financial Offer, tenderers must not add any new prices, but only explain the quotation on the basis of elements and prices already present in the offer. In case a tenderer alters his financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.
- Tenderers should be prepared to reply to such requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	10/08/2018	N/A
Last date on which clarifications are issued by Cedefop	14/08/2018	N/A
Deadline for submission of tenders (hand delivered)	20/08/2018	17.00h
Deadline for submission of tenders by post / courier	20/08/2018	N/A

Validity of the tenders	20/02/2019	N/A
Tender opening session	31/08/2018	11.00h
Estimated contract signature date	End of November 2018	

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

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

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

10. All costs incurred for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.
11. Up to the point of signature, the contracting authority (i.e. Cedefop) may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of an Order under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
https://www.cedefop.europa.eu/files/public_procurement_-_privacy_statement_2018-05-18.pdf
- You have the right of recourse at any time to the European Data Protection Supervisor (www.edps.europa.eu) for matters relating to the processing of your personal data.
14. Your personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE).
15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.

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.

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,

Michail Christidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DSL/AZU/Skillsdata&Intelligence/004/18

‘Provision of services related to skills data and intelligence’

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

About Cedefop

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

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

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

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

Shaping VET

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

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

Valuing VET

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

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

Informing VET

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

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

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year.

In addition to its web portal, 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

- Title of the contract: Provision of services related to skills data and intelligence
- Short description of content of this contract:
This contract aims at providing support to Cedefop in relation to data analysis and intelligence on skills and labour markets, primarily for the Skills Panorama, through the following services:
 - (a) engaging in data handling and analysis,
 - (b) conducting research in the area of skills and labour market
 - (d) transforming skills and labour market data and qualitative information into customised intelligence and
 - (e) organising and facilitating content-related workshops and focus groups.
- Type of contract:
Framework Service Contract whereby the services will be provided following the signature of Order forms throughout its validity. The number and content of Order Forms will depend on the needs of Cedefop.

1.2. Place of delivery or performance

Most of the tasks will be completed in the Contractor's premises and when necessary in Cedefop's premises, 123 Europe str., Pylea, Thessaloniki.

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers **may not** offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such

tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **800,000 EUR (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 not reach the above mentioned 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.

Important disclaimer

Estimation is based on the experience gained so far in the Skills Panorama and the foreseeable new activities. Although being developed and maintained by Cedefop, the Skills Panorama is an initiative of the European Commission, which provides political steering for the project. Thus decisions made by the European Commission may affect the site and generate needs for new developments or activities that cannot be foreseen at this stage.

Therefore, Cedefop cannot exclude that the estimated total volume of services might increase, due to external requirements for new services consisting in the repetition of similar services entrusted to the economic operator awarded the contract (after this open tender procedure).

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

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, 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

Payments will be made upon completion of specific tasks and after the approval by Cedefop Project Manager, within 30 days of submission of invoices and at the conditions set out in the draft contract.

2. TERMS OF REFERENCE

2.1. Background

Labour market information and intelligence plays an important role to support everyday decisions made either by individuals, companies or policy-makers. Availability of high quality information is essential for ensuring that individuals possess or are able to acquire skills in demand in the labour market. Europe is facing several challenges which are likely to affect its labour market in the future. The ageing society calls for a more effective use of the labour force as there will be fewer young people to replace those leaving the labour market due to retirement. Further concern arises that Europe may be unprepared for the evolution of a new digitalised economic reality. Accelerating change in technologies and skill demands spurs continuous debate about whether individuals will manage to adapt their skill sets sufficiently quickly to reduce the risk of being replaced completely by machines, or remain productive in jobs heavily affected by digitalisation, ensuring that EU societies do not experience high rates of technological unemployment and job/wage polarisation. Changing technologies and structural economic change are expected to feed into a higher reliance on cognitive and interpersonal skills in future workplaces. Thus, there is a constant need to identify the necessary skills to be developed so that individuals can successfully enter in and manage their career efficiently in the future labour market. Moreover, the availability of timely labour market information and intelligence is essential to enhance the responsiveness of education and training systems to labour market needs and to ensure appropriate skills matching.

Cedefop's analyses on skills in Europe feeds into to debates on future developments in European labour markets. In particular, since 2008, Cedefop regularly produces skill demand and skill supply forecasts ⁽²⁾. To complement its forecasts, Cedefop is also analysing skill mismatch. The work carried out in this context in recent years has aimed to improving conceptual definitions and better understanding the impact of skill mismatch on vulnerable groups of the population ⁽³⁾. It has also examined the extent of skill shortages in EU labour markets and the importance of company and country characteristics ⁽⁴⁾, while it has constructed indicators of potential imbalances between labour supply and labour demand in EU Member States ⁽⁵⁾. Cedefop investigates and synthesises available research findings but also engages in own primary data collection, including the first European Skills Survey in 2014 ⁽⁶⁾, to inform the policy debate on tackling skill mismatches across EU labour markets ⁽⁷⁾. Moreover, Cedefop explores changes in skill needs and subsequent skill mismatches due to digitalisation and the future of work ⁽⁸⁾; but also the importance and impact of

² <http://www.cedefop.europa.eu/EN/about-cedefop/projects/forecasting-skill-demand-and-supply/skills-forecasts.aspx>

³ See Cedefop (2010), *The skill matching challenge: Analysing skill mismatch and policy implications*, available on-line: <http://www.cedefop.europa.eu/EN/publications/15275.aspx>; also Cedefop (2011), *Migrants, minorities, mismatch?* Available on-line: <http://www.cedefop.europa.eu/EN/publications/18670.aspx>

⁴ See Cedefop (2012), *Skill Mismatch: The Role of the Enterprise*, Cedefop Research Paper No. 21, available on-line: <http://www.cedefop.europa.eu/EN/publications/19658.aspx>

⁵ Cedefop (2013), *Identifying and analysing imbalances in the pan-European skill supply and demand forecast*; Available by Cedefop on demand.

⁶ Information on Cedefop's European Skills Survey is available at: <http://www.cedefop.europa.eu/EN/about-cedefop/projects/analysing-skill-mismatch/analysing-skill-mismatch.aspx>

⁷ Cedefop (2012), "The Skill Mismatch Challenge", in: EU Commission (2012), *Employment and Social Developments in Europe 2012*, Office for Official Publications: Luxembourg. Available on-line: <http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7315>

⁸ Information on Cedefop's project 'Digitalisation and the future of work' is available at: <http://www.cedefop.europa.eu/en/events-and-projects/projects/digitalisation-and-future-work>

effective skills governance in addressing skill mismatches⁽⁹⁾. Currently Cedefop is developing a pan-European analytical tool for collecting data on skills demand by employers from online job postings using machine learning and big data techniques ⁽¹⁰⁾. Cedefop has also developed the European Skills Index, which measures the comparative performance of the skills formation and matching system of each EU country ⁽¹¹⁾.

To foster cooperation in the field of skill needs analysis, Cedefop established in 2004 Skillsnet – a network which brings together experts, researchers, policy makers and practitioners. Skillsnet provides a platform to present and discuss research methods and outcomes on new and changing skill needs in the labour market. Skillsnet actively involves policy-makers, social partners, practitioners and researchers in discussions on research outcomes. To transfer findings into policies and implementing reforms is of central importance and remains a key challenge.

Cedefop's analyses on skills anticipation and skill mismatches form a key pillar of the Skills Panorama website ⁽¹²⁾, established within the Europe 2020 flagship initiative 'An Agenda for New Skills and Jobs'. The overall objectives of the Skills Panorama are to improve transparency and mobility on the labour market, as well as to enhance the responsiveness of education and training systems to labour market demands. Consistent with these objectives the Panorama aims to act as a single entry point providing access to and promoting the use and dissemination of skills and labour market intelligence. The Panorama presents a rich set of national, European and international research findings, data and indicators on skills and jobs as well as analytical highlights (short, concise briefs on specific topics of interest), blog articles and collection of various other resources.

In January 2014, Cedefop took over the responsibility for further development of the Skills Panorama, on behalf of the European Commission. In December 2015, Cedefop launched a new Skills Panorama website with enriched data, information and intelligence for policy makers and policy analysts. In 2018, a redesigned website has been launched to better meet the needs of practitioners, in particular guidance counsellors.

The current Skills Panorama has the following sections:

- **'Explore'** which serves as the main entry point to all information available in the Skills Panorama in a form of thematic dashboards (by occupation, sector, country or policy theme).
- **'Indicators'** provide access to all quantitative data presented in the website with a possibility to explore various indicators and visualise them in different ways.
- **'Analytical highlights'** provide up-to-date succinct analysis about a skill, a group of skills, a sector, an occupation or a country with various thematic focus.
- **'Blog'** offers users the possibility to learn directly from experts on skills, share their insights and contribute knowledge to discussions on various skills-related topics.
- **'Resources'** give users a quick access to toolkits and guides, documents, websites any other relevant sources.
- **'Institutions'** provide the essential information and contact details of various institutions providing labour market information in Member States.
- **'News and Events'** offer news and developments in the field of skills in Europe.

⁹ Information on Cedefop's project 'Assisting EU countries in skills matching' is available at: <http://www.cedefop.europa.eu/en/events-and-projects/projects/assisting-eu-countries-skills-matching>

¹⁰ Information on Cedefop's project on big data analysis from online vacancies is available at: <http://www.cedefop.europa.eu/en/events-and-projects/projects/big-data-analysis-online-vacancies>

¹¹ <http://skillspanorama.cedefop.europa.eu/en/indicators/making-skills-work-index3>

¹² <http://skillspanorama.cedefop.europa.eu/>

For the Skills Panorama, Cedefop coordinates and manages both the work and analysis required to populate the site and technical development.

The aim of the current contract will primarily be to support Cedefop in providing the data analysis and intelligence for the Skills Panorama website. However, it may also be requested to the contractor to provide services for Cedefop's skills analysis and research more generally, depending on needs. The support for technical development of the website; and the actual display of (uploading and handling) of content on the Skills Panorama website is not part of this contract⁽¹³⁾.

2.2. General purpose and main services to be provided

The underlying motivation for the contract is to collect, update and provide new information on skills and labour markets produced from different sources, including those of Cedefop, perform data processing and analysis where necessary, and transform it into intelligence⁽¹⁴⁾. The deliverables produced under this contract will be used primarily in the context of the Skills Panorama.

The purpose of this contract is to support Cedefop in providing data analysis and intelligence on skills and the labour market, primarily for the Skills Panorama, through:

- a) data handling and analysis;*
- b) research in the area of skills and labour market;*
- c) transforming skills and labour market data and qualitative information into customised intelligence and*
- d) organising and facilitating content-related workshops and focus groups.*

To accomplish these objectives, the Contractor should adopt a multi-methods approach using both quantitative and qualitative techniques and analysing both primary and secondary data and sources. A Contractor's strong research capacity as well as ability to communicate research findings/key messages to various target groups (in the form of intelligence) is essential for successful execution of the contract.

The four principal services to be requested are described in Section 2.3.

2.3. Description of the services to be provided

For the Framework Contract the subset of these services will comprise the objects of specific forms (Order Forms) that will be submitted to the Contractor throughout its duration. These services will contribute to fulfilling the objectives outlined above.

2.3.1. Service (1) Data handling and analysis

Data handling and analysis will be one of the core services to be provided during the course of the Framework Service Contract. It may include analysis of data, statistics and results on economic

¹³ Cedefop has another contract in place for designing, developing, deploying and promoting a dynamic Skills Panorama website (No 2016-FWC6/AO/DSL/AZU-JBU/SkillsPanoramaUX/004/16)

¹⁴ For the purpose of this contract, the labour market intelligence is defined as interpretation of labour market information adapted to the needs of a particular target group.

and labour market conditions; education, qualifications, training and skills; current and future demand and supply of labour and jobs; skills requirements in jobs; vacancies and recruitment, etc.

Primarily the Contractor will be requested to update the existing indicators presented in the Skills Panorama as well as the European Skills Index. Proposing and developing new relevant indicators not yet covered in the website may be requested.

This Service focuses on quantitative data (e.g. construction of indicators) and will involve exploring both primary (e.g. micro-datasets) and secondary (databases, reports etc.) sources of information. The outcomes of this service could be presented in the form of a database or tables of indicators accompanied with possible visualisations. The aim of this service is to produce skills and labour market data ensuring cross-country comparability as well as comparisons across occupations, sectors and levels/types of skills. To fulfil the purpose set above, the Contractor will be requested to keep records of available sources, datasets and indicators, developed in the context of completed and ongoing work for the Skills Panorama.

The following detailed tasks and activities are foreseen:

- Handling, exploitation and analysis of relevant micro and macro datasets, including creation and maintenance of scripts for possible application on future updates or waves of data (where applicable). This may include also unique datasets which are not publicly available (e.g. Cedefop surveys, big data collected from online vacancies and other data relevant to skills analysis).
- Development, construction, testing and validation of new indicators as well as update existing ones. Where possible, the indicators should be disaggregated according to the main dimensions of interest (e.g. country/sector/occupation/level of education).
- Provision of further analysis and handling of the datasets in order to produce more complex (composite) indicators and indexes or conduct advanced statistical analysis, including data mining.
- Delivering indicators in a form of tables/spreadsheets/graphs/database but also providing suggestions for the best possible visualisation.

The level of analysis should ideally cover the EU country, sector, occupation, and skill dimensions. The Contractor should utilise timely, relevant and regularly updated data available from European and international sources, such as the EU LFS, PIAAC and PISA but may also be required to use national datasets.

The Contractor will be requested not only to focus on data and indicators which are already available but to also review a number of available datasets (i.e. go through the documentation) for research purposes (i.e. micro-datasets) and propose the use of additional ones (as suggested by recent literature) or the construction of new indicators that would be relevant to skills and the labour market. In the case of proposed indicators, justification for the selection as well as a full description of how these indicators can be retrospectively constructed using the original dataset should be provided for approval to Cedefop, before the Contractor proceeds with constructing any indicator. Cedefop may use the additional/new indicators internally for its own research purpose.

Currently, the data are being delivered in the form of .csv files and require a strong quality assurance process to be applied prior to delivery of the data.

The successful tenderer will also be expected to provide regular updates of the European Skills Index (every 2-3 years) and be able to work towards methodological improvements of the current version of the index. The new, updated version of the European Skills Index is presented *via* the Skills Panorama as of May 2018. The technical report and other supporting material can be made

available upon request ⁽¹⁵⁾. Any update of the Index provided by the Contractor will be expected to meet at the minimum the current standards (in terms of quality and established methodology) and to successfully go through a statistical audit from the European Commission's Joint Research Centre – JRC ⁽¹⁶⁾. The communication on the audit with JRC will be organised by Cedefop.

2.3.2. Service (2) Research in the area of skills and labour market

Research and analysis of relevant information and data in the area of skills and labour market is the second main pillar of this contract. It aims to support the Skills Panorama content development as well as other Cedefop's skills analysis activities. It will include analysis of data and available information about economic and labour market context; education, qualifications, training and skills; current and future demand and supply of labour and jobs; skills requirements in jobs; and vacancies and recruitment, etc.

These research activities could employ both quantitative as well as qualitative data and methods. The Contractor will be requested to ensure that all relevant European as well as national sources, where applicable are exploited in a consistent way that would allow capturing content related to key dimensions of skills and the labour market, such as sector, occupation, skills and country.

This service will primarily feed into Service 3 (see below), which mainly concerns the development of analytical highlights and blog articles. However, it may also concern research for ad hoc assignments pertinent to a thematic area on skills and labour market (e.g. a particular skill or sector; skill dimensions of a policy theme; developments in EU countries etc.). The expected deliverables may be specific dashboard, background material, country fiches, thematic reports etc. The latter may be published or used internally by Cedefop for its own research purpose.

Building on so far developments in the Skills Panorama, the need may exceptionally arise for research and analysis at the state of play in different EU countries, and/or on thematic areas relevant to education/training, skills and/or labour market. To meet the requirements of such an assignment, the Contractor will have to be in a position to quickly mobilise thematic experts across all EU Member States. Any list of thematic experts should be approved by Cedefop before the finalisation of the respective Order Form for Services.

Various skills related reports are being frequently published at European level and across European Member States. Monitoring and harvesting the analysis and data contained in these reports will be one of the core services of the contract. This will require mobilising a network of national contacts/experts to collect data and information at the national level.

The following detailed tasks and activities are foreseen:

- Reviewing of skills and labour market developments and provision of updates for the various dimensions of interest (sector, occupation, skills) at EU and national level (e.g. for the purpose of developing new series of analytical highlights);
- Providing secondary (meta-) analysis of available data and information at European and national level by reviewing secondary sources (databases, documents, etc.);
- Providing further skills and labour market analysis where necessary based on Cedefop needs.

¹⁵ The technical report and other supporting material for the European Skills Index can be requested only via C4T-services@cedefop.europa.eu.

¹⁶ <https://ec.europa.eu/jrc/en/coin>

2.3.3. Service (3) Transforming skills and labour market data into intelligence

The ultimate purpose of this service is to present a vast volume of available labour market data and information in a way that can be easily understood and be useful to the various groups of interest. This will entail further work with results from services (1) and (2) leading to interpretation that can be used for identifying and communicating key messages to various target groups. This can take the form of interpretation texts under charts in the dashboards, short briefs (e.g. Analytical highlights), reports, articles (e.g. blog entries), etc.

The data analysis and intelligence produced will aim at covering the needs of various target groups or stakeholders, in particular policy makers, information, advice and guidance (IAG) practitioners, staff from public employment services; analysts and experts; researchers as well as potentially other groups. To be able to provide relevant analysis of data and transform it into useful intelligence, it is of utmost importance to understand the needs of the users who are at the centre of our work. For that purpose it is essential for the Contractor to have a clear understanding of the interests and special characteristics of each of the stakeholders as well as the ability to appropriately interpret the relevant data and information, including suggestions for visualisations (e.g. infographics).

The above mentioned services will provide qualitative as well as quantitative labour market data and information in various forms (facts, briefs, reports, tables, spreadsheets, graphs or charts). These will also cover issues related to the past, present or future trends in the labour market and the factors that influence it. However, to be useful to various target groups, such data and information will have to be adequately delivered and adapted to users' needs (providing informed analysis, interpretation, conclusions and possibly recommendations).

The following detailed tasks and activities are foreseen:

- Proposing ways of transforming the skills and labour market data and information into intelligence focusing on users' needs and interests. The intelligence should take into account the overall context and make use of various sources, where possible, to ensure the validity of the intelligence provided (i.e. triangulation of the results).
- Preparation of reports of varying length based on: (1) the analysis of secondary data and information regarding skills and labour market developments or (2) combining the original data analysis with secondary data and information. These could range from very short to extensive reports based on Cedefop needs.
- Regular provision of intelligence in the form of short summaries, indicators or tools, etc., including proposals for appropriate visualisations (use of infographics, etc.).
- Providing the outcomes of comprehensive analyses on selected topics and issues of interest in a concise format (e.g. for policy makers).
- Validating the intelligence produced with representatives from key groups of interest or national experts.

2.3.4. Service (4) Organisation and facilitation of content-related workshops and focus groups

For the purpose of validating or consulting the work done under various services, the Contractor may be asked to organise and facilitate workshops or focus groups relevant to skills analysis or the intelligence produced with representatives from key groups of interest.

The following tasks and activities are foreseen:

- Identify relevant stakeholders, participants and speakers to be invited;

- Provide the venue, catering and other meeting requirements as well as ensure reimbursement of participants;
- Prepare all background material for the workshop; support Cedefop in designing the agenda and selecting optimal facilitation methods to reach the objectives of the event; and/or facilitate discussions;
- Write up the summary and outcomes of the workshop.

2.4. Deliverables

Individual deliverables will be specified within each Order Form and can be in form of reports or direct feeds into the Skills Panorama (e.g. data/indicators). Deliverables are expected to be of high quality and shall fully meet the expectations of Cedefop (as shall be described in the Order Form(s)).

The Contractor shall submit all deliverables in English, primarily in electronic format. Figures and tables should be delivered separately in Excel, in Word or in other agreed format, as appropriate. Excel charts should include the data used to be able to reproduce the charts. The electronic files must correspond fully to the hard-copy version (if applicable). The scripts (e.g. STATA log and do-files) used to run the analysis will be delivered to Cedefop to ensure the transparency and replicability of results. Lay-out and format of the text of final deliverables– in particular for citation, bibliography, tables and figures – have to comply with **Cedefop's style manual-Referencing guide and Publications template** (Annex H).

The Contractor shall ensure that all final deliverables as submitted to Cedefop have been subject to professional proof-reading and editing in English (i.e. by the copy editor).

2.5. Task assignment procedures

Cedefop and the Contractor will communicate in English. All tasks will be performed on a “fixed price request” basis, i.e. effort estimation (quote) and its approval by Cedefop will precede the issuance of Order Forms and execution of the services.

The following task assignment procedure will apply, before the signature of each Order Form:

- 1) A request for quotation is sent by Cedefop to the contractor, including the task description and the related technical specifications;
- 2) If necessary, clarifications may be requested by the contractor through phone conferences or emails. Cedefop will provide clarifications accordingly;
- 3) Within 10 working days, the contractor shall provide an estimate of the work-days the task will require, as well as the delivery date; quotes should take into account project management, documentation, follow-up and quality control of the deliverables;
- 4) If necessary, Cedefop will discuss the offer with the contractor (see step 3 above) until an agreement for the undertaking of the task or part of the task is reached;
- 5) The contractor will send a final (signed) offer to Cedefop;
- 6) An Order Form will be prepared and sent to the contractor by the Cedefop's Procurement Service for signature;
- 7) Upon signature by both parties, the Order Form enters into force and the contractor starts executing the task in view of providing the specified deliverable(s) within the agreed timetable.
- 8) The frequency and format of project updates will be agreed at the kick-off meeting.

2.6. Meetings and travel expenses

The contractor will be required to attend meetings at Cedefop in GR-Thessaloniki.

One kick-off meeting will take place at Cedefop premises in Thessaloniki upon signature of the first order form (est. December 2018). In addition and indicatively, it is foreseen to have 2 meetings with Cedefop per year where 2 persons of the research team/consortium will attend, i.e. 9 meetings in total including the kick-off (18 travels). At least one of these two annual meetings can take place using Skype or video-conference, upon agreement between Cedefop and the Contractor.

Meeting dates, frequency and number of representatives will be decided upon common agreement between Cedefop and the contractor.

Meeting expenses (i.e. travel and accommodation) will be paid to the contractor on the basis of the contractor's Financial Offer (see point 5.4, price schedule table, section 2).

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

2.7. Exploitation of the results of the contract / Anti-plagiarism checks

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

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

Article II.13 – Intellectual Property Rights

Article I.15.1 – Other Special Conditions, which complements the provisions of Article II.13 as regards the use of results of the research by the contractor

Article I.15.2 – Anti-plagiarism checks

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 **400,000 €**.

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.

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

3.2.2. Technical and professional capacity

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

Requirements for Technical and professional capacity:

- The tenderer must have provided services in the past **5 (five)** years in execution of at least **3** contracts in the field of comparative European labour market and skill related data, research and policy analysis and the capacity to analyse socio-economic data at national and European level with a combined total value of **600.000 €** at minimum.
- Ability to mobilise a network of national and thematic experts with the capacity to collect, analyse and report on skills and labour market developments demonstrated by the list of contracts where such experts were involved;
- Previous professional experience working with Eurostat micro-data and/or institutional eligibility to access Eurostat micro-data;
- The Tenderer's proposed team, which will be instrumental for the successful implementation of the contract, must have profiles, knowledge and experience relevant to the subject of the contract. In particular, the following profiles and minimum requirements are mandatory:

Project / Framework contract manager (1 CV)

- Minimum five (5) years of individual experience in managing/coordinating the administration and coordination services for complex EU-funded contracts;
- Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in 'Language levels of the Common European Framework of Reference (CEF) (¹⁷)').

Team Leader (1 CV):

- Minimum five (5) years of individual experience in European research project management;
- Minimum five (5) years of individual professional research experience in total (excluding education/academic studies), in two or more of the following fields:
 - o Comparative research and analysis of qualitative and quantitative data on skills, labour market and/or employment issues;
 - o Construction of labour market/education indicators;
 - o Secondary data analysis using qualitative techniques;
 - o Use of labour market/education data to create labour market intelligence.
- Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in 'Language levels of the Common European Framework of Reference (CEF)).

Senior researcher (at least 4 CVs):

- Minimum four (4) years of individual professional research experience in total (excluding education/academic studies), in one or more of the following fields (all fields should be covered by the set of proposed CVs):
 - o Comparative research on skills, labour market and/or employment issues;
 - o Construction of labour market/education indicators, including composite indicators and indices;
 - o Secondary data analysis using qualitative techniques;
 - o Use of labour market/education data to create labour market intelligence.
- Minimum four (4) years of individual professional research experience in handling, processing and engaging in data analysis of international, European or national socioeconomic data sources;
- In addition to the above, to cover the needs of Service 4 (organising and facilitating content-related workshops and focus groups) at least two senior researchers need to have proven experience in facilitating such workshops and/or focus groups;
- Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in 'Language levels of the Common European Framework of Reference (CEF)').

Tenderers could suggest a senior researcher as leader/responsible for each one of Services 1, 2 and 3. Depending on professional experience, and in consideration of the effort and time investment necessary for this capacity, a senior researcher may be leading up to maximum two Services.

The respective 'Service leaders' will ensure the smooth implementation of assignments and tasks under the service; the quality of all respective deliverables; and will be the main point of contact with Cedefop regarding all content-relevant issues of the particular Service .

Researcher (at least 4 CVs):

¹⁷ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

- Minimum two (2) years of individual professional experience in total (excluding education/academic), in one or more of the following fields (all fields should be covered by the set of proposed CVs):
 - o Comparative research on skills, labour market and/or employment issues;
 - o Construction of labour market/education indicators, including composite indicators and indices;
 - o Secondary data analysis using qualitative techniques;
 - o Use of labour market/education data to create labour market intelligence.
- Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in 'Language levels of the Common European Framework of Reference (CEF)').

Data scientist (at least 1 CV):

- Minimum five (5) years of individual professional experience in total (excluding any studies) in one or more of the following fields (however all fields should be covered by the set of proposed CVs):
 - o advanced statistical analysis of international, European or national socioeconomic data sources (preferably on skills, labour market and/or employment);
 - o data mining and big data analysis (preferably on skills, labour market and/or employment).
- Linguistic ability to communicate and draft to a high standard in English (Level B2 as determined in 'Language levels of the Common European Framework of Reference (CEF)').

Data handling expert (at least 2 CVs):

- Minimum three (3) years of individual professional experience in total (excluding education/academic studies) in handling and processing (cleaning and harmonisation) international, European or national socioeconomic data sources (preferably on skills, labour market and/or employment);
- Linguistic ability to communicate and draft to a high standard in English (Level B2 as determined in 'Language levels of the Common European Framework of Reference (CEF)').

Copy writer/editor (at least 1 CV):

- Minimum three (3) years of individual professional experience (excluding education/academic studies) in gathering information and writing for various target groups, including policy makers and using web/new media communication;
- Linguistic ability to communicate and draft to a high standard in English (Level C2 as determined in 'Language levels of the Common European Framework of Reference (CEF)').

Designer (at least 1 CV):

- Minimum two (2) years of individual professional experience (excluding education/academic studies) in design and data visualisation (e.g. infographics);
- Linguistic ability to communicate and draft to a high standard in English (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 company profile to prove the ability, technical know-how, experience and expertise needed for the provision of the required services under this call for tenders highlighting relevant experience in comparative European data and policy analysis, previous professional experience working with Eurostat micro-data, capacity to analyse socio-economic data at national and European levels (**please fill-in Questionnaire 4 of Annex G**);
- List of contracts with services provided by the deadline for submission of offers and within the past five (5) years describing the contracting authorities, the subjects, the amounts, the dates and the specific tasks performed by the tenderer, including clearly specified contracts where networks of country and/or various key thematic experts with the capacity to collect, analyse and report on skills and labour market development were involved (**please fill-in Questionnaire 3 of Annex G**);
- Detailed [CVs](#) of the experts whose involvement will be crucial for performing the contract (**please fill-in Questionnaire 5 of Annex G**). 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;
- Copy of an existing contract signed with Eurostat for access to Eurostat micro-data, or statement of eligibility to be checked against the legal entity form attached in annex D as filled in by the tenderer, in line with Eurostat restrictions on access to micro-data.

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium/Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC which can be found in the following link: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.

Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 36 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 5 SAA Countries (FYROM, Albania, Serbia, Montenegro and Bosnia & Herzegovina).

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

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

4.1. Joint Offers/ Groupings (Consortia)

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

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

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

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

4.2. Subcontracting/Subcontractors

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

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

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

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

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

5. AWARD OF THE CONTRACT

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

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

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

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

Whereby:

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

TFS = Total Financial Score 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 (TFS) and for this tender procedure it is fixed to **(30)**.

TFS is the Score for Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for the award (evaluation) criteria and in total a minimum of **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 evaluation will be carried out on the basis of the following technical award criteria:

- **Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (8 points)**
 - a) The level of understanding of concepts, literature and research issues related to skills analysis and labour market information at national and European level (3 points).
 - b) The level of understanding of challenges linked to transfer of the research findings on skills as well as labour market data and information into policy and practice (5 points).
- **Award criterion 2 – The appropriateness of methods suggested to carry out the work (20 points)**
 - a) The level of understanding of the conceptual and methodological challenges implied in the assignment, linked in particular to data and information availability at national and European level and to producing reliable and valid labour market and skills information and intelligence (10 points).
 - b) Suitability of methods and approaches suggested for all services, i.e. methodology for data analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (10 points).
- **Award criterion 3 – Preparation of 3 sample products according to the Annex K (42 points)**
 - a) Quality and appropriateness of the methods and approaches suggested and used for carrying out tasks as specified in the Annex K (3 points per product; 9 points in total).
 - b) Suitability for, relevance and clarity of the products to the specified target group in terms of information presented and its format (8 points per product; 24 points in total).
 - c) Efficiency of the process used for the development of the products, including the number of person days and profiles dedicated to the production of the sample products (3 points per product; 9 points in total).
- **Award criterion 4 – The organisation/management arrangements, risk assessment and quality assurance approach (30 points)**
 - a) Allocation of tasks and responsibilities of the proposed experts as well as the capacity to mobilise the required expertise, including a network of country experts, to ensure smooth execution of the work and tackle identified risks and challenges (10 points).
 - b) Organisational and management capacity to perform the tasks described in the terms of reference to achieve timely delivery of high quality outputs; that may simultaneously regard more than one task under more than one services, under pre-agreed and possibly overlapping deadlines (8 points).
 - c) The soundness, appropriateness and diligence of the overall risk management and quality assurance approach for carrying out the individual services (12 points).

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 four award (evaluation) criteria, and/or
- obtain an overall total score (Total Quality value) of less than the total **70** (of a maximum of 100) points against the award (technical) criteria,

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

5.2. Technical proposal

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

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

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

Tenderers are requested to include their technical proposal (envelope B) in one original 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 knowledge and understanding of the objectives, concepts, relevant literature and research issues related to the importance of skills and labour market intelligence for European skills systems (development, activation and matching of skills) (max. 5 pages).
- In-depth discussion of the potential challenges linked to transfer of the research findings on skills as well as labour market data and information into intelligence for policy and practice addressing the various target groups of the project (max. 5 pages).

For award criterion 2

- Assessment of the research challenges - conceptual and methodological – implied by the requested services that may adversely affect in any way the smooth execution and completion of tasks under the services (max. 6 pages).
- Description and explanation of the rationale for proposing specific approach and methods concerning each of the individual services as outlined in section 2.3 must be included (max. 3 pages per service).

For award criterion 3

- Tenderers are requested to follow the instructions in Annex K and to provide the respective deliverables requested therein.

For award criterion 4

- Explanation of the roles and responsibilities of the team members as well as demonstrating the capacity to mobilise adequate experts for specific assignments.
- Description of the organisational capacity and the management approach to ensure high-quality deliverables under all Services; as well as sound coordination of simultaneously running Services, conflicting deadlines demanding administrative tasks.

- Assessment of likely difficulties/challenges that may jeopardise the quality of deliverables, continuation of assignments or coordination of tasks under each Service (risk assessment); description and explanation of the suggested ways to overcome or minimise the before-mentioned challenges and their possible adverse effects; description of quality control measures and assurance processes for all and each service, including monitoring system to be put in place to allow Cedefop to follow the progress of work (e.g. online tracking system). The quality assurance process for delivery of data should be clearly described in terms of processes (steps, milestones, check points) and people involved.

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.

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

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

5.3. Financial evaluation

Only tenders scoring in total **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 have their financial proposal evaluated. The evaluation will be made on the basis of the **weighted price per profile and travel cost** offered (**Financial proposal**) in the Price schedule table (see point 5.4).

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: Framework contract manager	15
Category 2: Team leader	15
Category 3: Senior researcher	15
Category 4: Researcher	10
Category 5: Data handling expert	11
Category 6: Data scientist	13
Category 7: Copy editor	5
Category 8: Designer/visualisation expert	6
Category 9: Administrative staff	5
Category 10: Unit travel cost	5
Total	100

Total Financial Score (TFS) = Σ (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 no. of points.

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 (**TFS**) 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 should indicate the unit prices 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 per category.

Price schedule table

1)	Staff category	Unit price (EUR) per person-day
	Category 1: Framework contract manager	
	Category 2: Team leader	
	Category 3: Senior researcher	
	Category 4: Researcher	
	Category 5: Data handling expert	
	Category 6: Data scientist	
	Category 7: Copy editor	
	Category 8: Designer / visualisation expert	
	Category 9: Administrative staff	
2)	Attending meetings at Cedefop - see point 2.6	Price (EUR) per meeting/person

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

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

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.
- 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 on honour on exclusion criteria and selection criteria”

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

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

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

Please Tick ✓ the boxes provided

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

The tenderers should also ensure that:

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

ANNEX G

Questionnaires 1 - 6

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

ANNEX H

**« Cedefop Style Manual » and « Reference guide »
version April 2015**

ANNEX I

Models of power of attorney

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

ANNEX J

Model of Letter of Intent for Subcontractor/s

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

ANNEX K

Exercise (Award criterion 3)