

**CEDEFOP**European Centre for the Development
of Vocational Training

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 05/07/2012
RS/PRO/CALU/2012/0428**OPEN INVITATION TO TENDER****AO/RPA/ALSTI/Analysis of CVTS and AES/014/12****‘Analysis of the Continuing Vocational Training and Adult Education Surveys’****Ref.: contract notice - 2012/S 126-207877 of 04/07/2012**

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

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

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

or

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

or

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

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

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

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

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

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

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

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

| |
|---|
| <p>OPEN INVITATION TO TENDER</p> <p>CEDEFOP No: AO/RPA/ALSTI/Analysis of CVTS and AES/014/12</p> <p>‘Analysis of the Continuing Vocational Training and Adult Education Surveys’</p> <p>Name of tenderer:</p> <p>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p> |
|---|

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 point 6 of the attached Tender Specifications.

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

7.1 Contacts before the final date for submission of tenders:

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

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

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

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/EN/working-with-us/public-procurements/calls-for-tenders.aspx>). **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) | 14/09/2012 | 17.00h |
| Last date on which clarifications are issued by Cedefop | As soon as possible | N/A |
| Deadline for submission of tenders (hand delivered) | 24/09/2012 | 17.00h |
| Deadline for submission of tenders by post / courier | 24/09/2012 | N/A |
| Validity of the tenders | 24/03/2013 | N/A |
| Tender opening session | 08/10/2012 | 11.00h |

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of the Contract with the successful tenderer.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.
- You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data
14. Your personal data (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:
- the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/info_contract/legal_entities_en.htm), or
 - the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).
15. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/RPA/ALSTI/Analysis of CVTS and AES/014/12

***‘Analysis of the Continuing Vocational Training and
Adult Education Surveys’***

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

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

Cedefop, (the European Centre for the Development of Vocational Training) founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It provides the European Commission, Member States ⁽¹⁾ and social partners with insights into trends concerning VET and offers advice on how European VET policy should meet the challenges Europe and its citizens face.

The evidence Cedefop provides comes from its:

- Monitoring of VET policy developments and reforms in Member States;
- Comparative research and analyses, including anticipation of future skill supply and demand;
- Forums for debates among policy-makers, social partners, researchers and practitioners on the best ways to tackle the challenges Europe faces.

CEDEFOP'S OBJECTIVE AND PRIORITIES FOR 2012-14

Cedefop's activities are guided by its strategic objective and medium-term priorities for 2012-14. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET, that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

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

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

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

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

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness.

⁽¹⁾ Cedefop also works with Iceland and Norway.

New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

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

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

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

CEDEFOP'S INFORMATION

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year. Cedefop also coordinates the study visits programme for the European Commission. Study visits are short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning.

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

1 Overview of this tender

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 Technical and Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1 Description and type of the contract

- a) *Title of the contract:* Analysis of the Continuing Vocational Training and Adult Education Surveys
- b) Short description of content of this contract:

The objective of the contract is to analyse the extent, access, patterns, structure, governance, outcomes and financing of job-related learning and continuing vocational training in enterprises and among the adult population. It should exploit statistical results from the fourth Continuing Vocational Training Survey (CVTS4) and the 2012 Adult Education Survey. Key patterns and related policy messages should be included in two reports for publication using descriptive, multivariate and regression analysis with aggregated weighted data and microdata. A third internal report should address quality and methodological issues, providing recommendations to improve the measurement of adult and job-related learning and its effects.

- c) Type of contract: Direct Service.

1.2 Place of delivery or performance

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

1.3 Division into lots

This tender procedure is not divided into lots.

1.4 Variants

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

1.5 Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of 150,000 Euro (**without VAT**).

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have a duration of **21 months**.

1.7 Main terms of financing and payment

Payments will be made within 30 days of submission of invoices and at the conditions set out in the draft contract.

2 Terms of Reference

2.1 Background and context

The contributions of adult learning to key policy areas, such as employment, skills, age management, innovation and social cohesion policies are widely acknowledged. Continuing vocational training (CVT) provided by enterprises is one of the main pillars of lifelong learning, contributing to employability, safeguarding against unemployment and possibly also leading to benefits like increased job satisfaction, improved career prospects and wage gains. For enterprises, CVT is a means of raising productivity, modernising work practices and facilitating innovations. Many studies show that adult training has a positive impact on enterprise productivity, profitability or competitiveness.² Indeed, adult learning in the workplace is at the crossroads of major policy developments in lifelong learning, labour market participation of ageing workers, and the acquisition of ‘new skills’ that ‘new jobs’ will require.³

Within the EU, particular policy importance is accorded to the role of job-related learning and continuing vocational training. For instance, the Europe 2020 strategy, an agenda for New Skills and Jobs and the renewed European agenda for adult learning call for intensified action in this respect, while providing a number of policy orientations.⁴

So too does the Bruges Communiqué⁵ within the Copenhagen Process. It underlines that Vocational Education and Training (VET) is an essential part of the EU's education, training and employment strategies. Monitoring the implementation of common policies and strategies in education and training and of new methods of policy coordination at European level requires structured and continuous support in the form of internationally comparable indicators and research on education, training and skills. Numerous European policy documents underline such requirements alongside the need for better data (e.g. Copenhagen Process, renewed European agenda for adult learning).

Such analysis will provide a key contribution to Cedefop's medium-term priorities. Alongside providing recommendations that support the modernisation of VET systems, understanding how job-related learning help people manage their careers and can help enterprises to deal with technological change and increase competitiveness are key elements of Cedefop's three year strategic objectives (2012-2014).

European countries have been converging in terms of continuing vocational training provision in enterprises: improvements mostly in Eastern Europe and declines mostly in Western Europe. Different types of non-formal and informal learning are considered important for upgrading employee knowledge, skills and competence. Although widespread, the argument that traditional forms of CVT, namely courses, are replaced by other forms of learning at the workplace e.g. workshops, quality circles, does not appear to be corroborated by data. Instead it rather appears that ‘other forms’ of training complements course-based CVT provision in enterprises. At the same time, overall enterprise spending on CVT courses per employee has decreased over time, while AES data showed that cost is the third most important obstacle preventing individuals in Europe from participating in adult learning.

Company training tends to be strongly focused on the daily functioning of employees, whereas challenging labour market environments call for a workforce with a broad range of social and work-related competences. Apart from upgrading occupation-specific skills, workers need to expand their key competences, including communication, self-management, team working, the capacity to be creative and take initiative, and the ability to keep on learning and manage change. This should help individuals to deal better with career transitions - such as labour market entry/re-entry or episodes of up- or re-skilling –

² Cedefop 2010, Employer-provided vocational training in Europe: Evaluation and interpretation of the third continuing vocational training survey (http://www.cedefop.europa.eu/EN/Files/5502_en.pdf)

³ Cedefop 2011, Learning while working: success stories on workplace learning in Europe (http://www.cedefop.europa.eu/EN/Files/3060_en.pdf)

⁴ Europe 2020, A strategy for smart, sustainable and inclusive growth (<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>), An Agenda for new skills and jobs: A European contribution towards full employment (<http://ec.europa.eu/social/BlobServlet?docId=6328&langId=en>), Council Resolution on a renewed European agenda for adult learning (<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2011:372:0001:0006:EN:PDF>).

⁵ The Bruges Communiqué on enhanced European Cooperation in Vocational Education and Training for the period 2011-2020 (http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bruges_en.pdf).

fostering employability and helping people shape their careers. On-the-job learning and continuing training should therefore play a central role in lifelong learning and employment strategies.

Several strategies are used to increase participation of adults in learning. Improved cooperation among stakeholders and social dialogue is contributing to this goal, but public measures can also provide incentives and support for training provision. Despite limited involvement in training management, employee representatives and agreements between social partners seemingly have a positive impact on both CVT participation and intensity.

Public measures such as publicly-funded advisory services, financial subsidies and tax relief tend to impact positively on training provision in large and medium-sized training enterprises more than in small ones. This might be an indication that public measures are not always specific enough and well targeted. The efforts to be invested in procedures for accessing public measures can also be a hurdle for small enterprises that do not have specific personnel in charge of training.

Subsidies alone may not be sufficient to increase the share of enterprises providing training. Lack of awareness on training needs is, at present, a fundamental barrier to skill development in enterprises, which will need to be counteracted by appropriate policy measures. This includes stimulating demand, developing information and guidance, outreach strategies and intensifying cooperation between relevant stakeholders.

Further action needs to be developed to encourage training in SMEs, which are a key driver of economic growth and employment creation in the EU (though now suffering from the crisis) and which, even before the crisis, were more frequently *non*-trainers than large enterprises.

Moreover, training efforts in companies usually give priority to those in higher status jobs, who are often those with the highest education and training achievement. Low-skilled adults participate less in training and undertake less learning-intensive working tasks. At the same time, the number of low-skilled adults with advancing age is increasing, due to European demographic trends.

The combination of different policy measures, incentives and services for both individuals and employers is essential to encourage participation in learning and enterprise commitment to skill development.

For this, the Adult Education Survey provides in-depth information on participation in education and lifelong learning activities. New and more targeted questions have been introduced to respond to policy needs. The European continuing vocational training survey (CVTS) gives a unique insight into the conditions and provision of training in enterprises, with the latest round containing important variables on enterprise skill needs.

2.2 General purpose

There is a need for new, reliable information and analysis regarding the extent, access, patterns, structure, governance, outcomes and financing of job-related learning and continuing vocational training in enterprises and among the adult population.

Therefore the purpose of this contract is, having assessed data quality, to analyse and to interpret the statistical results of the fourth Continuing Vocational Training Survey (CVTS4) and the 2012 Adult Education Survey.

The Contractor should exploit CVTS and AES data published in Eurostat's on-line database and requested directly from Eurostat, CVTS4 and AES microdata, and the quality reports submitted by participating countries. In interpreting the results, previous data collections and other data sources and research results should be used to validate the results and to complete the picture of job-related learning and demand.

2.3 Specific objectives and description of tasks

There are three main phases to the work, divided into work packages.

Work package 1 Assessment of CVTS and AES data quality

The contractor shall evaluate and assess the quality of data for European countries, including:

- completeness of the data, main areas of missing data, reliability of variables and the role of imputations, where relevant;
- implementation of the common methodology in national surveys, and main problems to implement the common approach, e.g. collecting categories of cost data, distinction between CVT and IVT;
- relevant variables that caused major problems for respondents; reported deviations in countries and their possible impact on the comparability of the statistical results across countries;
- coherence with important definitions and concepts e.g. CVT, guided on-the-job training, work-based learning, or other definitions in the classification of learning activities;
- comparison with alternative sources where available e.g. Labour cost survey?

In this in-depth assessment, the contractor should devote relative attention towards the Continuing Vocational Training Survey, and should take into account the overall, general evaluation of CVTS and AES conducted by Eurostat⁶. Additional attention should be devoted to the AES variables which lend themselves to an integrated analysis of issues alongside the CVTS. Important conceptual conflicts between the two sources should be discussed. Further AES variables that are of particular importance to VET should also be addressed.

The contractor shall perform this work using the quality reports submitted by participating countries, data extractions provided by Eurostat, and other relevant documentation such as Eurostat's own quality assessment. If necessary, checks shall be made against country level information and data corrections shall be sought with Eurostat and integrated, where necessary.

In a stand-alone report format, having addressed the key issues, the contractor shall make recommendations for (i) interpreting the relevant data for analysis from an international perspective, which will feed into work packages 2 and 3, and (ii) improved future methods for the CVTS and AES questionnaires for measuring adult and job-related learning and its effects.

Work package 2 Analyse job-related learning, provision and related patterns using aggregated data

The aim of this work package is to conduct an analysis which takes account of both the enterprise and individual sides of job-related learning and provision using the CVTS and AES data.

The contractor shall prepare a series of data requests to Eurostat based on flat files or individual tables, depending on the data source.

With reference to the *policy agenda*, relevant themes and a shortlist of possible key indicators to analyse such patterns shall, based on the contractor's offer, be fine-tuned and agreed between Cedefop and the contractor. At the very least, from the enterprise side, the contractor should analyse the pattern and structure of vocational training in enterprises, taking into account enterprise size, main sector of economic activity and national characteristics, more specifically directing attention to training policy in enterprises, forms, volume, intensity and content of vocational training, incentives, obstacles and governance, costs, financing mechanisms, and links between the different aspects. From the individual perspective, the contractor should consider incidence, type of learning, socio-economic characteristics, reasons, barriers, benefits and drop-outs. Where possible the report will include an integrated analysis of the individual and enterprise results.

For relevant variables, the contractor shall also contextualise the results by making comparisons with previous rounds of the CVTS and AES, or perhaps with relation to labour market or enterprise trends (e.g. Labour Force Survey, Labour Cost Survey, Structural Business Statistics, European Innovation Survey).

⁶ See examples of the previous Eurostat evaluations at the following address:

http://circa.europa.eu/Public/irc/dsis/edtes/library?l=/public/lifelong_statistics/metadata_homepagehtm/ EN_1.0_&a=d

The most relevant analysis shall be written up as a report for publication. This will be closely linked with the policy agenda and should contain clear policy messages or recommendations. The latest data shall be used and any corrections needed on the raw data should be integrated into the analysis, where necessary.

Work package 3 Analyse job-related learning, provision and related patterns using microdata

Using a microdata extraction from the Eurostat CVTS and AES data sets, the aim of this work package is to investigate more deeply patterns relating to the provision of vocational training on the one hand and the demand on the other, including its associations with related background variables. To do so the contractor shall employ various techniques such as multivariate analysis (factor, cluster), correlation and regression analysis or additional descriptive analysis using microdata.

CVTS microdata are not expected to be available before June 2013. AES microdata are not expected to be available before December 2013 (although for around half of the countries they should be available by June 2013).

Tenderers should base their offer on both microdata sets being available. However, microdata release is subject to agreement by countries on the anonymisation criteria and methods to be followed, which at the time of writing has yet to be agreed. In the event that microdata are not made available for one or the other source (at all/in an appropriate format/in time), the contractor should increase the relative focus on the other source and may also be asked to conduct additional tasks (e.g. provide a document to publishable standard based on WP2 for Cedefop's Briefing Note series, related methodological documents to support Cedefop in its regular activities, tables/charts with appropriate format for direct publication on the Cedefop website). The alternative work to be conducted will correspond to the same financial value as if both microdata sets were made available.

The contractor will need to request microdata sets following the relevant Eurostat procedure.⁷ Microdata are free of charge.

2.4 Deliverables and timetable

| Work package | Deliverable | Indicative timetable |
|---------------------|--|----------------------------------|
| WP1 | <ul style="list-style-type: none"> ▪ Stand alone data quality assessment of approx. 50 pages (excluding annexes), with recommendations for future methodological improvements (not intended for publication, but for internal circulation and among EU stakeholders). | April 2013 (t + 4 months) |
| WP2 | <ul style="list-style-type: none"> ▪ One overview report of approx. 80 pages (excluding annexes) with key policy messages, to publishable standard in EN, following Cedefop style guidelines, along with accompanying tables and charts in Excel format (intended for publication). ▪ Excel, SPSS, Stata or CSV files with full results. | September 2013 (t + 9 months) |
| WP3 | <ul style="list-style-type: none"> ▪ Microdata analysis report (around 60-80 pages, plus annexes) to publishable standard in EN, following Cedefop style guidelines, along with accompanying aggregated tables and charts in a format to be agreed (intended for publication). ▪ Excel, SPSS, Stata or CSV files with aggregated results and accompanying scripts. | June 2014 (t + 18 months) |

For illustrative purposes, the publication might include the following elements: a summary and key findings, detailed results, general conclusions and recommendations, bibliography, tables and other additional relevant information, e.g. methodological details.

⁷ See <http://epp.eurostat.ec.europa.eu/portal/page/portal/microdata/introduction>

2.5 Reports

In addition to the above deliverables, two short, formal reports are expected:

- **Interim report:** short overview of work progress, difficulties encountered, intermediary findings, annexed WP1 report and WP2 report (September 2013);
- **Final report:** short summary of work conducted plus annexed key products and results from WP 1-3 (September 2014).

All reports shall be submitted to Cedefop in English. They should be submitted in Microsoft Word with all tables, graphs or images included at the appropriate place in the text. The reports shall be supplemented by any graphs, tables and images in the appropriate software application and by the statistical databases used during research to allow for quality control (aggregated data).

The Contractor shall ensure that the reports intended for publication and as submitted to Cedefop have been subject to professional proof-reading and editing in English and that they comply with the requirements of the Cedefop style manual (see Annex H). The cost for this should be included in the Financial Proposal (the Table in point 5.4, item 2c).

Cedefop will provide comments on all deliverables and reports submitted. The contractor will take these comments into account, liaising closely with Cedefop.

The Contractor is required to submit the reports and data (Word/Excel) in **English, in electronic form** (CD-ROM; e-mail). The electronic files must correspond fully between formats e.g. charts in Word and Excel versions. Charts must contain links to the data used (in separate worksheets for Excel) so that they can be edited and reproduced. Electronic files must correspond exactly to the hard-copy version. Cedefop reserves the right to ask for any background data, and evidence of computations and the quantitative models used in the analysis carried out by the contractor, including accompanying scripts.

2.6 Scheduled meetings

The contractor will be requested to attend three (max. one-day) meetings at Cedefop with the team responsible for statistics:

- A kick-off meeting a few weeks after signature of the contract to agree a more detailed work plan as well as discuss and fine-tune possible themes and methods to be used based on the contractor's offer (indicative timing December 2012)
- A progress meeting to discuss the results of the WP1 report, monitor progress and discuss the preliminary findings and key messages of the WP2 reports (indicative timing May 2013)
- A meeting to discuss the microdata analysis, monitor progress and discuss the interim findings and key messages of the WP3 study (indicative timing May 2014).

2.7 Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop's meetings (point 2.6 above) have to be included in the financial offer, point a) - sub-total (2) of Table 1.

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in points 2.3 and 2.4, have also to be included in the financial offer, point b) – sub total (2) of Table 1.

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

3 Specific information concerning participation to this tender procedure

3.1 Exclusion criteria

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

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

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

3.2 Selection criteria

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

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

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

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

3.2.1 Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer for the last three financial years concerning the type of services covered in this call for tenders should be at least **150,000 €**

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

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

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

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

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

3.2.2 Technical and professional capacity

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

Requirements for Technical and professional capacity:

- Previous professional experience working with Eurostat microdata and/or Institutional eligibility to access microdata;
- At least three (3) contracts performed in the past five (5) years in conducting cross-country comparative statistical analysis in the fields of job-related learning and continuing vocational education and training in European countries;
- The Tenderer's experts involved in performing the contract must have the following knowledge and experience:

For the proposed Team Leader

- **Minimum five (5) years** individual experience in European research project management;
- **Minimum five (5) years** individual professional experience in conducting cross-country comparative statistical analysis in the fields of job-related learning and continuing vocational education and training in European countries, including evaluating statistical surveys;
- **Minimum three (3) years** of professional experience in handling and processing large international data sets as well as AES or CVTS microdata at the national or European levels;
- Linguistic ability to communicate and write to a high standard in English (at least Level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)").

For each of the proposed Researchers/team members who will be involved in the study

- **Minimum three (3) years** individual experience in conducting cross-country comparative statistical analysis in the fields of job-related learning and continuing vocational education and training in European countries, including evaluating statistical surveys;
- **Minimum two (2) years** of professional experience in handling and processing large international data sets as well as AES or CVTS microdata at the national or European levels;
- Linguistic ability to communicate and draft in English: for those to be involved in drafting documents to at least level C1 as determined in "Language levels of the Common European Framework of Reference (CEF)", for the other experts to at least level B2.

Proof / Evidence 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 demonstrating the tenderer's experience as per the above requirements (**please fill-in Annex G – Questionnaire 3**);
- Copy of a contract signed with Eurostat for microdata, or statement of eligibility to be checked against the legal entity form attached in annex D of the Tender documents and in line with Eurostat restrictions on access to microdata;⁸
- List of main concluded contracts performed in the past five (5) years which conducted cross-country comparative statistical analysis in the fields of job-related learning and continuing

⁸ <http://epp.eurostat.ec.europa.eu/portal/page/portal/microdata/documents/EN-AES-MICRODATA.pdf>

vocational education and training in European countries, including evaluating statistical surveys, describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Annex G – Questionnaire 4**);

- The CVs, preferably in Europass format⁹, of the experts involved in performing the contract, which includes information on previous experience and linguistic abilities as per the above requirements as well as a brief description of output/publications related to the issues of the study.

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. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form. Tenderers are also requested to complete the respective forms (tables) in Annex G.

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).

⁹ <http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

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 106 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 34 countries, namely: the 27 EU member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, FYROM, Albania and Montenegro).

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

A natural or 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. However the subcontracting of persons/ economic operators from non-eligible countries is limited to max 30% of the work by value.

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value and total subcontracting does not exceed 40%), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

5 Award of the contract

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

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

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

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

Whereby:

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

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

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to (70);

Y is the weighting for price (TFO) and for this tender procedure it is fixed to (30).

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each of the award (evaluation) criteria 1-3 and in total a minimum of **65** out of 100 points (TQV) in the technical evaluation – see below).

5.1 Technical evaluation

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

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

Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (**20** points);

- The level of understanding of the overall objective of the work to be conducted as well as its policy and general contexts (5 points)
- The level of understanding of challenges linked to the main data sources to be used (15 points)

Award criterion 2 – Quality and relevance of the methods suggested to carry out the work foreseen in each of the work packages (**60** points)

- Quality and relevance of the proposed approach in relation to the specific objectives of the work, including themes, variables, methods and techniques suggested for analysis within the different work packages (20 points for each work package),

Award criterion 3 – Appropriateness of organisation and management of the work (**20** points)

- Allocation of tasks, type and degree of involvement of the proposed experts (10 points)
- Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (10 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 award (evaluation) criteria 1-3 above, and
- obtain an overall total score (Total Quality value) of less than 65 (of a maximum of 100) points against the award (technical) criteria,

will not be considered acceptable and will be eliminated from further evaluation. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.4).

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 / Technical Specifications 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 or Technical Specifications 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 to) all requirements outlined in the Terms of Reference / Technical Specifications.

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

For award criterion 1:

- A succinct discussion of the subject demonstrating in-depth understanding of the concepts, policy, research and methodological issues (maximum 3 pages);
- An assessment of the key associated challenges (including conceptual and methodological) implied by the assignment;

For award criterion 2:

- For each of the work packages, a detailed description of the envisaged approach and methods, including the suggested main themes and issues that should be analysed, along with key related variables or indicators where relevant, potential data sources, classifications to be used, etc.¹⁰;

For award criterion 3:

- A detailed workplan illustrating:
 - proposed organisation and management of the tasks including explanations of the role and extent of team member participation in the study,
 - time-table with descriptions of the deliverables and any related milestones (please refer to points 2.4 and 2.5);
- A preliminary risk assessment of likely difficulties in carrying out the work and proposed actions to address these.

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

In addition to the above the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 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.

¹⁰ In preparing their technical proposal, tenderers should assume that both CVTS and AES microdata will be available.

5.3 Financial evaluation

Only tenders scoring in total 65 points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each of the award criteria 1-3 above will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer TFO**) in the Price schedule table (see point 5.4).

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

*Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) * Y.*

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

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in EURO and include all expenses.
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.

5.4 Financial Proposal

The Financial Proposal should indicate the total price in order to carry out all the activities as indicated in the Terms of Reference. The tenderers must fill-in the following Price schedule table and present a detailed breakdown of the price offered¹¹.

The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5). All services that shall be procured should be included.

Model for Price schedule table for fee based contract

| 1) | Names / positions of the Experts /Service (if applicable) | Number of person-days | Unit price (EUR) per person-day | Price (in EUR) for services/ experts |
|---------------------------------|---|---------------------------------|----------------------------------|--|
| | 1a) | | | |
| | 1b) | | | |
| | 1c) | | | |
| | 1 N) | | | |
| Subtotal 1 (1a+1b+.....) | | | | |
| 2) | 2a) Attending 3 meetings at Thessaloniki - see point 2.6 and point 2.7, 1st par. | Number of meetings/person | Price (EUR) per meeting/person | Amount (EUR) for all meetings |
| | 2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks – see point 2.7, 2nd par. | Number of persons | Price (EUR) per person | Amount (EUR) for travel, accommod. etc |
| | 2c) Other administrative expenses including professional proof-reading and editing in English of final report – see point 2.5. | Number of Units (if applicable) | Unit price (EUR) (if applicable) | Amount (EUR) for other administrative expenses |
| Subtotal 2 (2a+2b+2c) | | | | |
| 3) | Total Price (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2 | | | |

¹¹ In preparing their financial proposal, tenderers should assume that both CVTS and AES microdata will be available.

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

The Financial Offers will be checked for any arithmetical errors in computation and summation. Errors will be corrected by the evaluation committee as follows:

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will be the price taken into account. Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

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

6 Information on presentation and content of tender

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

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

6.1 Envelope A - Supporting documents

One original and one copy of:

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

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

6.2 Envelope B – Technical proposal

One original signed version and three copies of:

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

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 separate file in *.pdf format)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf format)

ANNEX C

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

(Given as 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 provide an explanation for the reason |
|---|---------------------------------------|--------------------------|--------------------------|---|
| | | Yes | No | |
| <u>Envelope 'A' must contain</u> | | | | |
| one original and one copy of: | 6.1 | <input type="checkbox"/> | <input type="checkbox"/> | |
| - 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) entitled to sign contract) | Art. 4 of Invitation to tender; 6.1 | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Exclusion Criteria Declaration (including those of consortium members and subcontractors, if applicable) | 3.1, 6.1 & Annex C | <input type="checkbox"/> | <input type="checkbox"/> | |
| - selection criteria documents (If applicable, including those of consortia and subcontractors) | 3.2, 4.1, 4.2, 6.1 | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Questionnaires 1-4 (Annex G) | 3.2, 3.2.1, 3.2.2, 4.1, 6.1 & Annex G | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Power of attorney of partners in joint bid / Consortium (if applicable) | 4.1, 6.1 & Annex I (models 1 or 2) | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Letter of intent of subcontractor (if applicable) | 4.2, 6.1 & Annex J | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Legal Entity Form | 3.3, 6.1 & Annex D | <input type="checkbox"/> | <input type="checkbox"/> | |
| - Financial Identification Form | 6.1, Annex E | <input type="checkbox"/> | <input type="checkbox"/> | |
| - this Checklist | 6.1 & Annex F | <input type="checkbox"/> | <input type="checkbox"/> | |
| <u>Envelope 'B' must contain</u> | | | | |
| one original and three copies of: | 6.2 | <input type="checkbox"/> | <input type="checkbox"/> | |
| - the technical proposal | 2, 5.1, 5.2, 6.2 | <input type="checkbox"/> | <input type="checkbox"/> | |
| <u>Envelope 'C' must contain</u> | | | | |
| one original and three copies of: | 6.3 | <input type="checkbox"/> | <input type="checkbox"/> | |
| - the Financial Proposal | 5.3, 5.4, 6.3 | <input type="checkbox"/> | <input type="checkbox"/> | |

The tenderers should also ensure that:

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

ANNEX G

Questionnaires 1-4

(Given as separate file in *.doc format)

ANNEX H

CEDEFOP STYLE MANUAL

(Given as separate *pdf file)

ANNEX I

MODELS of POWER OF ATTORNEY

(Given as separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate file in *.doc format)