

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

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 27/11/2012  
RS/PRO/CALU/2012/1038**OPEN INVITATION TO TENDER****AO/RPA/GRUSSO-ABARA/Narrative of learning from the low skilled/022/12**

‘Narrative of career/ labour market related learning of low skilled workers’

**Ref.: Contract notice 2012/S 228-374347 of 27/11/12**

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](mailto: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><b>OPEN INVITATION TO TENDER</b></p> <p><b><i>CEDEFOP No: AO/RPA/GRUSSO-ABARA/Narrative of learning from the low skilled/002/12</i></b></p> <p><b><i>‘Narrative of career/labour market related learning of low skilled workers’</i></b></p> <p><b>Name of tenderer: .....</b></p> <p><b>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</b></p>
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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](mailto: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](mailto: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)	<b>10/01/2013</b>	17.00h
Last date on which clarifications are issued by Cedefop	<b>&lt; as soon as possible &gt;</b>	N/A
Deadline for submission of tenders (hand delivered)	<b>18/01/2013</b>	17.00h
Deadline for submission of tenders by post / courier	<b>18/01/2013</b>	N/A
Validity of the tenders	<b>18/07/2013</b>	N/A
Tender opening session	<b>31/01/2013</b>	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.

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.

12. 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](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

## 13. 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](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](http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf)).

## 14. 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/GRUSSO-ABARA/Narrative of learning from the low skilled/022/12**

Narrative of career/ labour market related learning of low  
skilled workers

## **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 <sup>(1)</sup> 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**

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<sup>(1)</sup> Cedefop also works with Iceland and Norway.



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

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

- **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](http://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](http://www.cedefop.europa.eu), Cedefop's work can be followed on Facebook at [www.facebook.com/cedefop](https://www.facebook.com/cedefop) and Twitter at [www.twitter.com/cedefop](https://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 a Technical and Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

### 1.1 Description and type of the contract

- a) Title of the contract: Narrative of low skilled workers: the role of learning in promoting labour market integration and successful careers.
- b) Short description of content of this contract: The study will investigate how low-educated / low-skilled workers with a low socio-economic background think about education and continuous learning. The inquiry will be based on a collection of individual narratives that should bring out attitudes, aspirations and expectations towards learning. This research on low educated workers prone to the risk of unemployment and social exclusion intends to uncover the potential among individuals to re-engage in learning and become socially upwardly mobile. The results of the study will be used to inform Cedefop's research agenda on the topic of how adult and work-based learning can help people to better manage careers and working-life transitions, to set the stage for future analyses, and to pave the way for policy recommendations.
- c) Type of contract: Direct Service (related to research activities).

### 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 **300,000 Euro** (excluding VAT).

### 1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have duration of **eighteen (18) 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 information

The study will investigate how low-educated / low-skilled workers with a low socio-economic background think about education and continuous learning. The inquiry will be based on a collection of individual narratives that should bring out attitudes, aspirations and expectations towards learning. This research on low educated workers prone to the risk of unemployment and social exclusion intends to uncover the potential among individuals to (re-)engage in learning and the social and labour market benefits of learning from the individual's point of view.

The study will tease out the different ways in which training and other forms of skills development can support low-educated workers to better manage their careers and working-life to increase employment security. It will also provide insights about barriers and reasons for resistance to learning. The results of the study will set the stage for future analyses, and pave the way for policy recommendations.

The study will be based on narrative inquiry in order to arrive at an understanding of the ways in which people in selected European countries create meaning of their lives in relation to education and work. Workers will be asked to reflect upon their experiences with schooling, training and learning (or the reasons for their non-participation), their aspirations for their career and experiences with career transitions. The narrative approach is meant to bring to the surface the heterogeneity of individuals' experiences in regard to the nexus between learning and labour market outcomes. This context information will provide further insights into the interrelationship between structure and agency, which entails information about obstacles and barriers to lifelong learning and labour market outcomes, but also on how opportunity structures may help in alleviating or lifting these.

#### 2.1.1 Introduction

Social inclusion is one of the most urgent problems for the European Union. With more than 80 million people at risk of poverty – including 20 million children and 8% of the working population - social exclusion related to a low socio-economic background<sup>2</sup> and low education has been identified as one of three pressing priorities in the Europe 2020 strategy for smart, sustainable and inclusive growth<sup>(3)</sup>. Improving educational levels and promoting social inclusion through skills, especially aimed at improving workers' employability<sup>(4)</sup> and at reducing poverty, are shared objectives which guide the action of the member states and of the European Union.

Low educated workers from poor socio-economic background form a distinct group in every society. They are often perceived as a group with little interest in learning and few labour market opportunities, prone to unemployment, and social marginalization. Sometimes stereotypes depict members of this group as having social difficulties leading to non-desirable work related behaviours.

The two dimensions - low education and poor social economic background – often interplay to generate social disadvantage. Those individuals being born in a family with low socio-economic background are, through informal cultural reproduction, less prone to acquire higher educational degrees or even to finish school before they reach upper-secondary level<sup>(5)</sup>. The literature on social reproduction suggests that students might fear that success leads to disconnecting them from their peers and local communities or fear to fail when trying to move out of their social environment where one's network could not be supportive anymore. This vicious cycle of cultural reproduction maintains the status of low education and leads to low income because of the weak position these individuals have consequently in the labour market<sup>(6)</sup>.

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<sup>(2)</sup> In order to identify the target group to be studied the definer for low socio-economic status is a net-income of 20% above the national poverty line.

<sup>(3)</sup> European Commission (2010). European platform against poverty and social exclusion. <http://ec.europa.eu/social/main.jsp?langId=en&catId=961>

<sup>(4)</sup> COM (2009) Council Conclusions on a strategic framework for European cooperation in education and training ("ET 2020"), Luxembourg: Publication Office of the European Union. [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/educ/107622.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf)

<sup>(5)</sup> Lindstrom, L., Doren, B., Metheny, J., Johnson, P. & Zane, C. (2007). Transition to employment: Role of the family in career development. *Exceptional Children*, 73(3), 348-366.

<sup>(6)</sup> Bourdieu, P., Passeron, J.-C. (1990). *Reproduction in education, society and culture*. Sage.

Not only has this group less resources, but individuals are also more prone to labour market risks. In fact, members of this group tend to be less sheltered from labour market fluctuations; for example the recent economic crisis has seen an increase of the incidence of unemployment among the low skilled, fuelled by the swell in the flow of low skilled workers from employment to unemployment. Low-skilled workers tend to be overrepresented in sectors and jobs in decline in the European economy, i.e. agriculture and manufacturing sectors and in routine jobs which can be offshored or replaced by technology or new forms of work organisation. They also tend to be working in sectors, such as construction, which are more exposed to business cycle fluctuations. On the contrary, the fraction of higher educated in employment has steadily increased during the economic crisis, albeit at a slower pace than before <sup>(7)</sup> and there are clear signs that low educated workers have been exposed to displacement outside the labour market during the crisis. These trends are by no means specific of the present economic crisis but the recent recession has made them more acute.

Training is a valuable resource that can effectively decrease the risk of unemployment or underemployment as well as social exclusion, however, because low educated/low skilled adults have fewer training opportunities, less financial resources and low social support for participation in learning activities, they need targeted form of support to promote their participation in education and training <sup>(8)</sup>. While financial mechanisms and opportunities and incentives aimed at the low educated have been put in place, these might have a design that does not make them appealing to the group that would most need them. In addition, the extent to which one is able to support a family is an important part of role identity. Workers will not engage in full-time education (and rather look for any type of job) unless in the condition to economically support themselves and their family during training. Research shows that besides the availability of financial resources and other incentives, workers' willingness to engage in training depends on prior educational / training experience and assessment of one's own capacities. To complicate matters, the members of this group have built an identity which is grounded into a working class culture <sup>(9)</sup>.

Learning and participating in education is strongly interlinked to identity building; the result is that often students withdraw from their engagement in learning and due to a lack of family and peer support seek alternative forms of self-affirmation (oftentimes reinforced by anticipation of troubled relations with employers in the workplace, anticipations which are not necessarily grounded in reality). Low educated and low-skilled adults often inherit the belief that the school system or the provisional institutions for further learning do not offer a learning environment that caters for their learning needs, and that they are left to fend for themselves. Such a reaction could increase the likelihood that they begin to feel helpless in the face of transitions and this, ultimately, could lead to social exclusion. Under these circumstances it is a challenge to motivate these individuals to participate in training and adult education to improve their employability. They have a considerable individual and social need for personal and/or collective support for completing relevant work-related training or education programmes.

The main psychological problem occurring in this situation is an identity defence. There persists to be a more or less unconscious urge to cling to a professional identity (or another identity) that has formerly been the basis of their self-respect and dignity <sup>(10)</sup>. Therefore, participation in education often only takes place if there is an emotional identification with the learning context. Continuing education or retraining must be offered and conducted in ways that respect the existing identity at the same time as a new identity is gradually built up.

Adult Education has often failed to address the specific concerns of this target group as it resembles schooling. Therefore, educational measures have to be based on a better understanding of what low skilled individuals' learning preferences are and what constitute adequate learning environments. Often individuals have held good jobs for many years through which they earned their living and social position, and which built the foundation for their identity. Losing one's job or returning to education

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<sup>(7)</sup> Cedefop (2012). The skill mismatch challenge in Europe. In: EU Commission, Employment and Social Developments in Europe, Chapter. 6, Luxembourg: Publication Office of the European Union (forthcoming).

<sup>(8)</sup> This is controversial because if skills beget skills the investment in skills at a later age is less efficient from a purely economic point of view. However, considering that the wider benefits of education are larger for the low educated there is still a case for a well-designed second chance education (through re-training).

<sup>(9)</sup> Willis, P. (1981). *Learning to Labor*. How working class kids get working class jobs. Columbia University Press.

<sup>(10)</sup> Kirpal S., Rauner F. (2007) *Identities at work*, Dordrecht, Springer.

Ecclestone K., Biesta G., Hughes M. (2010) *Transitions and learning through the life course*, London, Routledge.

often leads to a feeling of being somehow misplaced. Individuals in these situations feel it is unfair and infantilizing that they have to go back to school and to the subordinate position of a pupil.

Low skilled workers often lack the cultural resources or capital to reflexively play with their identities and actively reconstruct them <sup>(11)</sup>. So the way in which education and training is delivered will play a significant role in the success of policies targeting this group. Policies in support of lifelong learning need to take into consideration that resistance to learning can occur when workers are directed (either by active labour market policies or by guidance services) towards learning environments in which they do not feel comfortable. A sense of not belonging is based on one's acculturation in a social environment with very limited financial and social resources (lack of role models, who are successful at the labour market) and a culture of resistance based on the belief that social upward mobility by means of education is impossible <sup>(12)</sup>.

Narratives describe the wide variety of reasons for engagement or non-engagement in learning, perceptions about and experiences with life/career transitions. The policy focus on employability, up-skilling and successful career transitions, however, firmly embeds the present study in the labour market. Sometimes a career transition is a self-initiated process, something wanted and hoped for. Usually such a transition involves the intentional planning of a preferred future, the setting of a goal and a steady movement towards it. In other cases a transition is triggered by perceptions derived from one's acculturation in a particular social environment and the resulting resistance to learning and upward mobility. It remains a challenging task for governments to identify the range of individual needs among low educated and low-skilled Europeans, who experience problems to participate and be active in society in order to support transition phases and promote successful careers.

This study therefore focuses on two dimensions: low socio-economic background and low educated – leading to a status of low-skilled at the labour market. The group of low-skilled workers to be studied refers to males and females in the age group of 25 to 40 years. They have left school early or finished the lowest compulsory school degree and come from a low socio-economic background. Individuals might have been unemployed or under-employed in low-skilled jobs, which had an effect on their sense of stability and earnings in life.

### 2.1.2 Related projects

- Cedefop studies on labour market outcomes of VET and on VET benefits <sup>(13)</sup>
- Cedefop studies on skills mismatch and skills obsolescence <sup>(14)</sup>
- Cedefop's studies on VET financing <sup>(15)</sup>
- Cedefop's studies on labour market transitions and lifelong learning <sup>(16)</sup>
- Cedefop's studies on Guidance <sup>(17)</sup>
- Cedefop's studies on Work-Place Learning <sup>(18)</sup>

<sup>(11)</sup> Barone, C. (2006). Cultural capital, ambition and the explanation of inequalities in learning outcomes: A comparative analysis. *Sociology*, 40(6), 1039-1058.

<sup>(12)</sup> Atherton, J. (1999). Resistance to learning: a discussion based on participants in in-service professional training programs. *Journal of Vocational Education and Training*, 51(1), 77-90.

Johnson, W., Brett, C.E. & Deary, I.J. (2010). The pivotal role of education in the association between ability and social class attainment: A look across three generations. *Intelligence*, 38, 55-65.

<sup>(13)</sup> Cedefop (2011), The economic benefits of VET for individuals. Luxembourg: Publications Office of the European Union. <http://www.cedefop.europa.eu/EN/publications/18070.aspx>

Cedefop (2011), Vocational education and training is good for you - The social benefits of VET for individuals. Luxembourg: Publications Office of the European Union. <http://www.cedefop.europa.eu/EN/publications/18440.aspx>

<sup>(14)</sup> Cedefop (2012) Preventing skill obsolescence, Briefing Note. <http://www.cedefop.europa.eu/EN/publications/20414.aspx>

Cedefop (2012) Skill mismatch The role of the enterprise. Luxembourg: Publications Office of the European Union. <http://www.cedefop.europa.eu/EN/publications/19658.aspx>

<sup>(15)</sup> Cedefop (2009) The use of tax incentives for education and training Luxembourg: Publications Office of the European Union. [http://www.cedefop.europa.eu/etv/Upload/Information\\_resources/Bookshop/536/5180\\_en.pdf](http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/536/5180_en.pdf)

Cedefop (2009) Individual learning accounts, Luxembourg: Publications Office of the European Union. <http://www.cedefop.europa.eu/EN/publications/12896.aspx>

<sup>(16)</sup> Cedefop (2012). Open invitation to tender: Learning for career and labour market transitions – individual biographies. <http://www.cedefop.europa.eu/en/working-with-us/public-procurements/18698.aspx>

<sup>(17)</sup> Cedefop (2009), *Professionalising career guidance*, Luxembourg: Publications Office of the European Union.

## 2.2 Purpose and tasks of the study

### 2.2.1 Purpose of the study

The purpose of the study is to extract common themes, approaches, ways and/or trajectories representing how low-skilled workers can be supported in their learning activities, career development, employability and career transitions. The study also seeks to better understand the variety of reasons explaining low-skilled workers' disengagement with education and their non-participation. The analysis of the interviews should lead to the identification of:

- Attitudinal and structural obstacles and barriers to lifelong learning (including the importance of learning for identity formation),
- How previous experiences with learning (in schools and possibly the decision to drop out) influence the decision to participate in training,
- Aspirations and expectations on the outcomes of participation in adult education (including expectations on related to labour market outcomes and how these may materialize),
- The ways in which learning did contribute to positive labour market outcomes,
- Drivers for workers to engage in different forms of learning,
- A description of the learning experience and specific learning characteristics/environment considered useful by individuals,
- Perception of one's skills and competences and their usefulness at the labour market, as well as
- Experiences with and attitudes towards setting goals and objectives.

In this framework, the way individuals make sense of their life experiences and their learning can reveal the particular ways in which low skilled workers benefit from engagement in and support for further learning.

The analysis of the narrative accounts may therefore touch upon the following issues:

- Why are low skilled workers significantly less engaged in learning activities?
- What are identified drivers for learning?
- How do low skilled workers envision the outcomes from participation in adult education?
- How do individuals think about participating in adult education? To what extent is this vision shaped by prior experiences?
- Which role does learning play in considerations about one's future?

### 2.2.2 Description of the tasks

During the course of the study, the contractor is expected to:

- Carry out **secondary desk research** to summarize findings on learning as well as resistance to learning among low-educated / low-skilled workers from a low socio-economic background. This literature review should also summarize findings about best practices to include these groups in learning activities / qualifying programs. The literature review should distinguish among the identified groups of low skilled workers (low skilled; low educated, with a low socioeconomic background) and describe their particular circumstances and needs (special attention should be paid to school drop outs).
- Prepare the **collection and analysis** of narrative and biographies from low skilled individuals:

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<sup>(18)</sup> Cedefop (2008) Career development at work, Luxembourg: Publications Office of the European Union.

<http://www.cedefop.europa.eu/EN/publications/12936.aspx>.

Cedefop (2011) Learning while working, Luxembourg: Publications Office of the European Union.

<http://www.cedefop.europa.eu/EN/publications/17770.aspx>

- 1) Prepare a guideline for semi-structured narrative interviews (depending on the outcome more than one interview with one interviewee might be necessary).
- 2) Identify the sample and carry out interviews.
- 3) Analyse the narratives.
- Prepare a **study report** addressing the following questions:
  - 1) Identify how the individual approached learning in their life.
  - 2) Identify obstacles for learning as well as potential to overcome these obstacles.
  - 3) Summarize how lifelong learning can support social inclusion by integrating the results from the narrative accounts with those from the desk research.
  - 4) Provide complementary national institutional and cultural context information (e.g. welfare policies, social policies, culture etc.) as far as needed to understand the analysis and interpretation of the narratives.
  - 5) Develop a conceptual framework for the comparative study of individuals' subjective perception about the relation between learning and social inclusion.

## 2.3 Methodology

Data are to be gathered by secondary desk research and primary qualitative research involving narrative interviews and their analysis. Whenever relevant, existing data and information on the resistance towards learning/lifelong learning among low-educated/low-skilled adults (non-participation) or national and international surveys should be used to support the qualitative analysis. The use of narrative analysis will necessarily involve a small and selected sample. Consequently, the results will be difficult to generalize to the entire population. This drawback will be compensated, however, by the deepness and richness in the level of detail of the description of the ways in which learning is viewed and approached, how skills and skill needs are perceived and how learning supports labour market transitions and upward social mobility.

### 2.3.1. Desk Research

Desk research should be carried out to:

- Review recent and most relevant literature in the field, with special attention to studies analysing the experiences in European countries;
- Review recent literature about low skilled workers, their perceptions towards learning (individuals' dispositions) and career development, their particular live circumstances (structural conditions) and methods and measures applied in order to support them;
- Put in perspective the literature on barriers to learning, stressing how identity issues and social interaction might influence behaviour;
- Review relevant material (policy strategies, laws and regulations) to delineate the national context (in the countries to be covered with the interviews) and the factors that affect the ways low educated workers from a low socio-economic background engage in adult education (structure and characteristics of the educational provision, active labour market policies, relevant features of the welfare system, i.e. income support while in training or adult education);
- Review available statistical data in relation to participation in adult education to decide to what extent they can inform the current study and/or be used for the development of a theoretical framework.

### 2.3.2. Sampling and data analysis



The study will adopt a qualitative approach using information resulting from the analysis of narrative interviews on how learning is supporting labour market transitions. The data should result from semi-structured interview questions.

A minimum of 15 good quality individual narrative accounts per country shall be collected.

Since the purpose of the study is to contribute towards an integrated model of how learning can support labour market transitions, the sample to be recruited should be as representative as possible of low-educated/low-skilled workers. Individuals to be recruited for the interviews should be between 25 and 40 years of age from a poor socio-economic background (in the range till 20 % above the poverty line). They could be working in all the sectors of the economy, or have been working if unemployed, but they should not be long term unemployed. Females and males should be represented fairly equally.

### 2.3.3 Scope of the Study

The study will recognize that learning can take place in many different settings. Lifelong learning is defined as all learning activity undertaken throughout life, which results in improving knowledge, know-how, skills, competences and/or qualifications for personal, social, and professional reasons. It encompasses all forms of learning:

- both planned or unplanned (non-formal learning);
- in formal or informal settings;
- in all types of learning situations (social, workplace, schools or training providing institutions);
- for personal or work-related purposes;
- from all kinds of subjects (teachers, trainers, mentors, colleagues, peers, and friends).

### 2.3.4 Country Coverage

Although the interrelationship between low socio-economic background, low education and low skilled employment is well established in the social science literature, not much is known about the individuals' reasoning for ending up in this status or individual perceptions about potential gains from further engagement in learning and skills development. The interaction between learning and labour market transitions might differ across economic systems and socio-cultural conditions. Institutional factors will influence the ways adult learning supports career transitions depending on, for example, the presence of occupational labour markets or different skill formation regimes. Skill formation regimes describe the interaction between labour market institutions, welfare state institutions and institutions in charge of skills formation. There are different taxonomies available to choose from: that of the Varieties of Capitalism (VoC) literature <sup>(19)</sup> or one of the possible alternative taxonomies reviewed in a recent Cedefop study <sup>(20)</sup>.

To investigate the variety of reasons and backgrounds that prevent individuals from engaging in learning and lead them into a status of low-skilled, the study will be based on qualitative data. Adults, who have already entered the labour market, could be asked retrospectively to reflect upon their past learning experiences and learning needs for the jobs that they have held. The qualitative data collected should bring to the surface the deeper causes of resistance to learning and non-participation in formal and non-formal learning activities. The study intends to investigate the heterogeneity of individuals' experiences

<sup>(19)</sup> Hall P., Soskice D. (2001) *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage* New York: Oxford University Press.

Thelen, K. (2004) *How Institutions Evolve: The Political Economy of Skills in Germany, Britain, the United States and Japan*, Cambridge, New York, Melbourne: Cambridge University Press.

Crouch, C., Finegold, D. and Sako M. (1999) *Are Skills the Answer? The Political Economy of Skill Creation in Advanced Industrial Countries*, New York: Oxford University Press.

Iversen T., Stephens (2008), "Partisan Politics, the Welfare State, and Three Worlds of Human Capital Formation", *Comparative Political Studies*, vol. 41, 600-637.

Busemeyer M. (2009), "Asset specificity, Institutional Complementarities and the Variety of Skill Regimes in Coordinated Market Economies", *Socio-Economic Review*, 7,375-406.

Busemeyer, Marius R. and, Trampusch, Christine eds, (2012) *The Comparative Political Economy of Collective Skill Formation Systems*, Oxford University Press.

<sup>(20)</sup> Cedefop (2011) *Vocational education and training is good for you – The social benefits of VET for individuals*. Luxembourg: Publications Office of the European Union.



and life circumstances. It seeks to identify country specific and cross-country factors in order to formulate policy recommendations in support of low-skilled workers. Of particular concern is explanatory background (context) information about obstacles and barriers to lifelong learning and labour market mobility, but also opportunity structures. Data will be collected in seven (7) European countries which will provide the opportunity for a cross-cultural and cross-institutional analysis in the following countries: Germany, United Kingdom, France, Poland, either Italy **or** Spain, either Denmark **or** Sweden, and either Hungary **or** Czech Republic. They are geographically representative for different parts of Europe and represent different skills formation systems (related to the importance of shared investments for the country and the institutions – also political ones - put into place to safeguard these investments from the risk of unemployment) and labour market policies according to the varieties of capitalism approach.

## 2.4 Reports, Deliverables and Timetable

An **inception report** should be delivered one **month** after the date of signature of the contract and following the kick-off meeting with Cedefop representatives. The inception report should describe the methodology proposed in the tender (e.g. draft versions of questions and interview guidelines, sample recruitment, type of analysis).

A draft **interim report** presenting the findings from the desk-based research (see point 2.3.1) and preliminary evaluation on the collection of the narratives will be delivered **7 months** following the signature of the contract. The annex should include all transcripts. Following comments by Cedefop, a final interim report should be delivered **9 months** following the signature of the contract.

The main deliverable will be the **final report** (+/- 300 pages plus annex including the transcripts) integrating the results from the desk research and those from the narrative analysis in a working model that could be used to inform future research activities, highlighting the main drivers and the areas that still need attention.

The final report should consist of the following elements: executive summary (6 pages); description of methodology; presentation of findings; conclusions and recommendations. A draft final report should be delivered **16 months** following the signature of the contract and the final report, following comments by Cedefop, within **18 months** of the date of signature of the contract. The final report will reflect the comments mentioned above.

The contractor shall submit all deliverables in English, in hard copy and in electronic format. Figures and tables should be delivered separately in Excel or in Word, as appropriate. Excel charts should include the data used to be able to reproduce the charts. Interviews' transcripts (translated in English) and synthesis will have to be delivered on CD Rom or Flash memory device. The electronic files must correspond fully to the hard-copy version. Lay-out and format of the text – in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (see Annex H).

The selected Contractor shall ensure that the final report(s) as submitted to Cedefop has (have) been subject to professional proof-reading and editing in English, the cost should be included in the Financial Proposal (the Table in point 5.4, item 2c).

## 2.5 Meetings and Travel expenses

The Contractor (up to 2 persons) will be requested to attend the following one-day meetings at Cedefop with the project managers responsible:

- (1) **kick-off meeting** two to three weeks after the signature of the contract to fine-tune the research methodology to be applied, the data sources to be used and the final planning, described in the inception report;
- (2) **a meeting to discuss the draft interim report**, monitor progress and discuss the interim findings;
- (3) **a meeting to discuss the final outcomes and key policy messages** included in the draft final report, and discuss possible improvements to the final report of the study.

The tenderer should include in his financial offer the expenses related to the three above mentioned meetings/travels (see point 5.4, item 2a).

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the Terms of Reference have also to be included in the financial offer (see point 5.4, item 2b of the Price schedule Table).

The contractor might be asked to present and discuss the outcomes of the project with some European experts and other stakeholders at a validation seminar organised by Cedefop. The related travel expenses shall be reimbursed by Cedefop separately, according to its relevant rules (see draft contract attached in Annex B).

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 draft contract attached 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 subcontractors (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, 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**

#### **Requirements for Technical and professional capacity:**

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

The Tenderer must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference. In particular, the Tenderer must comply with the following requirements:

- At least three (3) contracts performed in the past five (5) years similar to the nature of the services provided as those required in this call for tenders;
- The Tenderer's research team, who will be proposed to implement the contract, must comply with the following requirements:

The Team Leader:

- University degree (PhD) in Social Sciences: culture anthropology, educational studies, or sociology;
- at least 7 years of experience in research project management;
- at least 7 years of experience in each of the following fields: Qualitative research methods (biographical research and narrative analysis) and lifelong learning research.

There must be at least one senior expert complying with the following profile:

Senior Expert:

- University degree (PhD) in Psychology: cognitive psychology or personality psychology or social psychology or narrative psychology;
- at least 5 years of experience in each of the following fields: narrative analysis, research on resistance to learning.

Other Senior Experts must have the following profile:

Senior Expert:

- University degree (PhD) in Social Sciences: culture anthropology, educational studies, or sociology;
- at least 5 years of experience in each of the following fields: research on resistance to learning or lifelong learning or learning for marginalized/at-risk groups and narrative analysis.

Junior Expert:

- University degree (at least Masters) in Social Sciences: culture anthropology, educational studies, psychology or sociology
- at least 3 years of experience in each of the following fields: Qualitative research methods (narrative analysis), lifelong learning research.

All members of the research team:

- Linguistic ability to communicate and draft to a high standard in English (at least B2).

### **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 Tenderer's profile including information as to experience relevant to the subject of this call for tenders – See Questionnaire 3 of Annex G.
- List of main contracts performed in the past **five (5)** years similar to the nature as those required in this call for tenders, describing the contracting authorities, the subjects, the dates, the percentage and the specific tasks performed by the tenderer (Questionnaire 4 of Annex G);
- The CVs of the team leader and the research team members proposed to implement the contract. CVs should include information as to experience as well as lists of publications, both relevant to the subject of this call. They should also present the linguistic abilities. For the junior researcher, the CV must also include proof of training and experience in narrative analysis. The tenderers might use the Europass format.

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).

## 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 J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective Subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract

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

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 no 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 will be applied to this tender procedure:

- ***Award criterion 1 – The level of understanding of the interrelationship between low socio-economic background, low education and low skills, resistance to learning and the necessity to learn for labour market participation and the implications for policy debate (25 points)***
- ***Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (60 points)***
  1. Appropriateness of the methodology proposed to meet the foreseen challenges - conceptual and methodological –. (20 points)
  2. Quality of the narrative accounts to be collected (30 points). The focus will be on three crucial aspects: the recruitment of the sample, the quality of the interview carried out (outline and duration of the interviews, relationship between interviewee and interviewer) and the quality in the use of the information derived from the interviews (interviewer bias, triangulation, corroboration and member check).
  3. Number of interviews (10 points): The tender with the highest number of interviews (denoted by tot\_int\_max) will be awarded 10 points. The other tenderers will be awarded a number of points proportional to the ratio of the proposed number of interviews to the maximum number of interviews proposed [(tot\_int/tot\_int\_max)\*10].



➤ **Award criterion 3 – The organisation and management arrangements (15 points)**

- Allocation of tasks, type and degree of involvement of the proposed experts (5 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, and
- obtain an overall total score (Total Quality value) of less than **65** (of a maximum of 100) points against the award (technical) criteria,

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

## **5.2 Technical proposal**

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference / 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 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.

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

### **For award criterion 1**

A concise discussion paper on how socio-economic backgrounds impact on workers' aspirations and expectations thus affecting their educational choices and the way this group is seen from outsiders (stereotypes held by employers on the work readiness) to produce disadvantage on the labour market. The ways in which participation into learning activities contributes to identity formation (and group affiliation) and how this is shaped by previous experiences (in school or other institutions). The ways in which participation in learning activities may bring about important labour market and social outcomes and the implications for policy, with due reference to research literature, should also be discussed.

### **For award criterion 2**

1. Short description of the methodological technique implied by the assignment; prior assessment of the research challenges - conceptual and methodological – implied by the assignment and proposed solutions.
2. Description of the interviews: Outline and planned duration of the interviews, ways of recruiting, ways in which the trust relationship between interviewee and interviewer is to be established, number of interviewers involved, description of bias (interviewer bias), triangulation, corroboration and member check.
3. The total number of interviews (the sum of the interviewees across the countries covered by the proposal). The total number of interviews could be increased by increasing the number of interviews in the requested countries or by increasing the number of countries covered by the study. If one or more countries are added to the requested countries the tender shall ensure that a minimum number of 20 good quality interviews shall be carried out in each country.

**For award criterion 3**

Detailed work plan illustrating intended organisation, milestones and management of the task including:

- explanation of the role and extent of the team members' participation in the study
- timetable with descriptions of the deliverables, and risk assessment and proposed solutions for events that could impair the tenderer's ability to meet the deadline.

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

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

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

**5.3 Financial evaluation**

Only tenders scoring 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 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:

*$$\text{Financial score} = (\text{cheapest Financial Proposal} / \text{Financial Proposal of the tender considered}) * Y.$$*  
*Where Y = price weighting (see the complete formula under point 5 above)*

**5.4 Financial proposal**

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

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

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

**Price schedule table**

1)	Names / positions of the Experts /Service	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
<b>Subtotal 1 (1a+1b+.....)</b>				
2)	2a) <b>Attending 3 meetings at Cedefop</b> - see point 2.5	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
				.
	2b) <b>All estimated travel, accommodation, etc. expenses related to performance of the tasks</b> (if applicable ) - see point 2.5	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommod. etc
	2c) <b>Other administrative expenses including professional proof-reading and editing in English of final report</b> – see point 2.4)	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
<b>Subtotal 2 (2a+ 2b+2c)</b>				
3)	<b>Total Price (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2</b>			

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.

**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.

## **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:

- (1) cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- (2) the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C;
- (3) the selection criteria documents as requested in points 3.2, 4.1, 4.2
- (4) Questionnaires 1 – 4 as found in Annex G
- (5) Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- (6) Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- (7) the Legal Entity Form as requested in point 3.3 and found in Annex D
- (8) the Financial Identification Form as found in Annex E
- (9) 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)**

## **ANNEX B**

### **DRAFT CONTRACT**

**(Given as separate file in \*.pdf)**

## **ANNEX C**

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

**(Given as separate file in \*.word)**

## **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](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 (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](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 (with indication of name and function), but not by subcontractors.

**PLEASE NOTE:**

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

**ANNEX F**  
**CHECK LIST OF MANDATORY DOCUMENTS**

**(Given as separate file in \*.word)**

## **ANNEX G - Questionnaires 1-4**

**(Given as separate file in \*.word)**

## **ANNEX H**

### **CEDEFOP STYLE MANUAL**

**(Given as separate file in \*.pdf)**

## **ANNEX I**

**MODEL 1 - POWER OF ATTORNEY**

**MODEL 2 - POWER OF ATTORNEY**

**(Given as separate file in \*.word)**

## **ANNEX J**

### **Model of Letter of Intent for Subcontractor/s**

**(Given as separate file in \*.word)**