



European Centre for the
Development of Vocational Training
Procurement Service

Thessaloniki, 19/06/07
PRO/2007/296

OPEN INVITATION TO TENDER

AO/B/RLAR/Guidance-Qualifications/005/07

“A study on qualifications routes and competences needed by career guidance counsellors”

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 Tendering Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted in one of the official languages of the European Union.
2. Tenders may be submitted:
(a) either by post or by courier service to be dispatched not later than **23/07/2007** in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

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

Important:

*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.*

- (b) delivered by hand not later than 17:00 on **23/07/2007** to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece**

In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery. Cedefop is open from 9.00 to 17:00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

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

The outer envelope or parcel should be sealed with adhesive tape and signed across the seal and carry the following information:

<p style="text-align: center;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/B/RLAR/Guidance-Qualifications/005/07</p> <p style="text-align: center;">“A study on qualifications routes and competences needed by career guidance counsellors”</p> <p style="text-align: center;"><i>Name of tenderer</i></p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
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The outer envelope must contain three inner envelopes, namely, **Envelope A, B and C**. 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 so that there can be no doubt as to words and figures.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft service 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 **02/08/2007**, 11.00 hours (local time). 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:

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 nature of the contract. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Request for additional information received less than five working days before the closing date for submission of tenders will not be processed.

- The contracting authority 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 tender.

Any additional information, including that referred to above, will be published on Cedefop’s website. Please ensure that you visit regularly the site for updates.

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.

8. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful Tenderer.
9. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
10. 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. This decision must be substantiated and the tenderers notified.
11. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

George Paraskevoidis
Head of Finance and Procurement

Attached: tendering specifications

OPEN INVITATION TO TENDER

AO/B/RLAR/Guidance-Qualifications/005/07

**“A study on qualifications routes and competences needed by
career guidance counsellors”**

Tendering specifications

Table of contents

Introduction to CEDEFOP	6
1 Overview of this tender	7
1.1 Description of the contract	7
1.2 Place of delivery or performance	7
1.3 Value or quantity of purchase.....	7
1.4 Validity of tenders	7
1.5 Duration of the contract.....	7
1.6 Main terms of financing and payment.....	7
2 Technical specifications	8
2.1 Introduction.....	8
2.2 Rationale and subject of the contract	8
2.3 Specific aims of the study.....	10
2.4 Description of the tasks	11
2.5 Deliverables, reports and timetable (outcome).....	12
2.6 Meetings and travel expenses.....	13
3 Specific information concerning participation to this tender	14
3.1 Exclusion criteria.....	14
3.2 Selection criteria.....	14
3.3 Legal Position.....	15
4 Additional information concerning participation to this tender	16
4.1 Participation of consortia.....	16
4.2 Subcontracting/Subcontractors.....	16
5 Award of the contract.....	16
5.1 Technical evaluation.....	16
5.2 Technical proposal	17
5.3 Financial evaluation	18
5.4 Financial proposal	18
6 Information on presentation and content of tender.....	19
6.1 Envelope A - Supporting documents.....	19
6.2 Envelope B – Technical proposal.....	19
6.3 Envelope C – Financial proposal.....	19

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on exclusion criteria
Annex D:	Legal entity form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Cedefop style manual

Introduction to CEDEFOP

The European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union. Created in 1975 with a tripartite Governing Board, it provides services for the European Commission, the European Union Member States and the social partners as well as for the associated countries of Norway and Iceland. The candidate countries are also associated with its activities.

As the European Union's reference centre for vocational education and training, Cedefop provides policymakers, researchers and practitioners with information to promote a clearer understanding of developments and so enable them to take informed decisions on future action. Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training.

The main tasks of Cedefop as defined in its founding Regulation are to:

- compile selected documentation and analysis of data;
- contribute to the development and coordination of research;
- exploit and disseminate useful information;
- encourage and support a concerted approach to vocational training development issues;
- provide a forum for a wide and diverse audience.

Cedefop's medium-term priorities for 2006-08 concentrate on the priorities set out in the Maastricht communiqué, which has been agreed by 32 countries, the European Commission and the European social partners:

- a) 'promoting the image and attractiveness of the vocational route for employers and individuals to increase participation in VET;
- b) achieving high levels of quality and innovation in VET systems to benefit all learners and make European VET globally competitive;
- c) linking VET with the knowledge economy's requirements for a highly skilled workforce and especially, because of the strong impact of demographic change, the upgrading and competence development of older workers;
- d) addressing the needs of the low-skilled (about 75 million people aged between 25 and 64 in the EU) and disadvantaged groups so as to achieve social cohesion and increase labour market participation.'

More information about Cedefop can be found on its website: <http://www.cedefop.europa.eu>

1 Overview of this tender

1.1 Description of the contract

The present call for tenders aims at commissioning a study on the qualifications and professional development routes for career guidance staff. The Contractor will also be required to design a common competence-based framework for guidance practitioners.

1.2 Place of delivery or performance

The tasks must be completed at the Contractor's premises.

1.3 Value or quantity of purchase

Maximum budget available for this activity is 100.000 EUR.

1.4 Validity of tenders

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

1.5 Duration of the contract

The resulting service contract shall enter into force on the date of signature of the last contracting party and shall be valid for a period of 12 months.

1.6 Main terms of financing and payment

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

2 Technical specifications

2.1 Introduction

The present open invitation to tender is issued in the context of the political priority attached at European level to career guidance and counselling. The key contribution which guidance can make to the achievement of four public policy goals - lifelong learning, social inclusion, labour market efficiency and economic development - is increasingly widely acknowledged both within Europe¹ and internationally. Such public policy goals are fundamental to the attainment of the Lisbon Council (2000) aim of making Europe the most competitive economy and knowledge based society in the world by 2010.

On 28 May 2004 the Education/Youth Council adopted a Resolution on strengthening policies, systems and practices in the field of guidance throughout life in Europe. The Resolution identifies a number of priorities including: improved access to guidance services across the lifespan, better quality assurance mechanisms, refocusing guidance provision on skills to manage learning and work, the strengthening of policy and system development structures and increased co-operation between guidance providers. The training and qualifications of career guidance counsellors are key factors for achieving the priorities defined in the Council Resolution.

As part of its activities to support Member States in the development of their vocational training systems, Cedefop is monitoring the development of guidance policies, systems and practices at all levels of education, training and employment, paying particular attention to progress achieved in implementing the 2004 Council Resolution on Lifelong Guidance. Against this background, this Call for tender aims at commissioning a study on the qualifications and professional development pathways for career guidance staff. These technical specifications describe the type and extent of the services required and the context in which they are to be delivered.

2.2 Rationale and subject of the contract

The Education Council Resolution on Lifelong Guidance (2004) noted that “in many countries, policies, systems and practices for guidance in Europe do not match the demands of knowledge-based economies and societies” and stressed that “services need to be available at times and in forms which will encourage all citizens to continue to develop their skills and competences throughout their lives, linked to changing needs in the labour market”². This paradigm shift in guidance provision and policy design towards services that would be accessible throughout the lifespan is having significant implications for the qualifications, initial training, and continuous professional development of career guidance staff.

Still, recent OCDE (2005)³ and Cedefop (2004, 2007)⁴ reviews suggest that professional qualifications and occupational standards for guidance counsellors seem to be poorly developed in most Member States. There is a great diversity across Europe, in the initial training guidance counsellors receive, the qualifications required upon recruitment, and the opportunities available

¹ The Helsinki Communiqué on enhanced cooperation in European Vocational Education and Training, http://ec.europa.eu/education/policies/2010/doc/helsinki_en.pdf

² Resolution of the Council on Strengthening Policies, Systems and Practices in the field of Guidance throughout life in Europe (May 2004) http://ec.europa.eu/education/policies/2010/doc/resolution2004_en.pdf

³ Peter Plant, **Career Guidance and Public Policy, Bridging the gap**, OECD, 2005

⁴ Ronald Sultana, **Guidance policies in the knowledge society. Trends, challenges and responses across Europe**, Cedefop, Panorama Series 85, 2004: 75-79; Ronald Sultana, **Europe and the Shift Towards Lifelong Guidance, A report on progress in implementing the Council Resolution**, Cedefop, Panorama Series, 2007 (to be published soon).

for ongoing professional development. Whereas in some countries specialised tertiary education training is required to enter the profession, in others few opportunities are available for the professional development of career guidance specialists. Within one country, different training and qualification standards can coexist across sectors.

Updating the skills and competences will be of crucial importance for implementing the change of paradigm to which Member States committed themselves when signing the Resolution on lifelong guidance. In order to identify relevant support measures to foster the professional development of career guidance counsellors, at local, regional, national and sectoral level, it is necessary to learn more about this diverse target group.

Guidance counsellors include a wide range of actors with different duties, occupational status and educational background. Career information and guidance are increasingly provided in a range of settings (schools, public employment services or the workplace) and by a diversity of actors whose primary occupation is not career guidance (school teachers, human resources specialists, line managers, public employment officers, trade union representatives...). As the settings for guidance provision diversify, issues emerge around how to train people for career guidance and information roles. Attempts to address this issue include the development of in-service and continuous training, professional standards and accreditation arrangements. Registers of guidance practitioners have been established in a number of countries, requiring from applicants to demonstrate initial qualifications, certified experience, and regular continuous training.

The professional development of guidance staff can be encouraged through the development of comprehensive career guidance competence-based frameworks, which can pave the way for new training courses, qualification standards and accreditation processes. Cedefop (2004) and OCDE (2005) reviews have recommended the development of these frameworks, as a basis for reforming guidance provision and achieving the “lifelong guidance paradigm shift”. Competence-based frameworks describe the core knowledge and skills to be acquired by practitioners in all areas of career guidance, as well as optional elements reflecting specialised knowledge and skills to be acquired by those who work in specific areas (schools, tertiary education, employment offices...) and with different types of users. Competence-based frameworks can help policy makers to plan training opportunities and assist professionals in their continuous career development planning, aiming at both full-time specialised career guidance practitioners and at those who are involved in career guidance on a part time basis.

Against this background, this Call for tenders aims at commissioning a study on the qualifications and professional development routes for career guidance staff and career guidance related personnel. 1) The study will review initial, induction, in-service and continuous training provision; qualification routes to become a guidance counsellor and entry requirements to work as a guidance counsellor; as well as professional standards and certification arrangements, for guidance staff acting in a variety of settings (education, labour), and across EU countries. 2) The contractor will explore the knowledge, competences, and skills which underpin effective professional delivery in different settings, as well as shared and distinctive functions implemented by guidance staff. The contractor will also identify key skills and competences required by the Lifelong guidance paradigm shift and emergent modes of guidance delivery. 3) The contractor will design a competence-based framework for guidance practitioners, which can embrace but also differentiate a variety of career guidance roles. The framework will be used to foster the discussion on the qualifications of guidance practitioners at European level, as well as to support policymakers and practitioners in drafting national and sectoral competence-based frameworks for the professional development of career guidance staff. 4) The study will highlight a series of recommendations for the different stakeholders concerned with the training and qualifications of career guidance counsellors. 5) Cedefop is planning to hold a seminar or a peer learning meeting on the qualifications of guidance counsellors in the final quarter of 2008. The contractor will be required to provide a proposal for this event, consisting of a detailed methodology, a structure of the sessions and a list of potential speakers with their contact details.

2.3 Specific aims of the study

More specifically, the study should result in the following outcomes:

(a) **An overview and in-depth analysis of in-service and continuous training, and other key initiatives linked to the qualifications of guidance staff**

The study will map and identify trends and patterns for the initial, in-service, continuous training and other key initiatives linked to the qualifications of guidance staff, such as certification and professional standards, in different guidance settings and across all Member States. The study will draw attention to shortcomings related to the professional development of career guidance staff, and areas which require further attention. The study will highlight examples of commendable practice and effective policies for a variety of countries and settings. The study will cover the 27 EU Member States, and the EFTA countries which are member of the European Economic Area.

The study will identify possible lines of actions for initiatives at local, regional, national, sectoral and/or European level to improve the professional development of guidance counsellors in Europe. Recommendations will be formulated in relation to key issues where action is more urgently needed.

(b) **Mapping and analysis of competences**

The study will identify core functions, competences and knowledge needed by guidance practitioners in different working settings, as well as key emerging competences and skills' needs related to the Lifelong Guidance shift paradigm and new modes of delivery.

(c) **Competence-based framework**⁵

The contractor will develop a common competence framework for Guidance counsellors in the EU. A competence framework can be defined as a generic description of the skills, knowledge and wider competences that guidance counsellors should possess to enable provision at a high level.

The framework should outline a number of core competences which career guidance staff needs to have, and propose a range of specialised competences according to the nature of the working setting, the type of work and client groups. The framework is to serve as a working tool to support guidance practitioners and policymakers to develop national and sectoral frameworks, quality assurance tools and professional standards, which will need to be contextualised according to specific national conditions.

As competence-based frameworks need to be developed through a careful process of consultation and consensus building, the contractor will be requested to liaise with key experts in the field, throughout the development of the framework.

The competence-based framework will be further discussed at a seminar or peer learning meeting Cedefop is planning to organise in the last quarter of 2008.

(d) **Structure of seminar on qualifications of guidance counsellors, including detailed description of sessions, topics to be addressed and a list of potential speakers.**

⁵ In the framework of this contract, guidance related staff's competences and qualifications will be described in terms of: knowledge, skills and wider competences. Definitions are taken from EQF: http://ec.europa.eu/education/policies/educ/eqf/com_2006_0479_en.pdf. "Skills" means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the European Qualifications Framework, "skills are described as cognitive (use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments)". "Competence" means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and/or personal development. In the European Qualifications framework, "competence is described in terms of responsibility and autonomy".

Cedefop intends to organise a seminar on the qualifications of guidance counsellors, at the issue of the study. In an annex to the study report, the contractor will provide a proposal for the seminar, including the structure, content, methodology and a list of potential speakers with their contact details.

The study will be published in hard copy form and widely disseminated to stakeholders from the guidance field. It will also be made available on-line on Cedefop's guidance web pages.

2.4 Description of the tasks

The contractor would be required to carry out the following tasks:

- Implementing desk research, and considering relevant secondary sources, amongst them (but not limited to these) :
 - Jackson, C. (2007, Cedefop, to be published), **Career Development at Work. A review of Career Guidance support for people in employment**, provides elements of information on the accreditation and training of career counsellors working in a range of intermediary organisations such as trade unions and private guidance providers;.
 - Sultana, R. G and Watts, A.G. (2005, European Commission, DG Employment, Social Affairs and Equal Opportunities), **Career Guidance in Europe's Public Employment Services, Trends and Services**, should be consulted with respect to the initial and continuous training of career guidance staff working in Public Employment Services;
 - OCDE (2004): **Career Guidance, A Handbook for Policymakers** and, Plant, P. (2005, OCDE) **Career Guidance and Public Policy, Bridging the gap**, provide some elements of information on challenges related to the training and qualifications of guidance practitioners.
- Collecting and analysing primary and in depth information on competences required from guidance staff in different settings, training opportunities, certification and qualification standards in all the Member States and the EFTA countries, through the analysis of relevant bibliography, interviews with stakeholders, and any other qualitative research techniques;
- Identifying a number of key experts and correspondents for the collection of primary data as well as the discussion and validation of the main findings, as research progresses, in particular, the competence based framework;
- Defining research methods and tools for the collection and analysis of primary and secondary data must be decided by the contractor, in particular, a grid for the systematic description and analysis of training opportunities and other key initiatives related to the qualifications of guidance staff;
- Elaborating a study report, as described in points 2.2 and 2.3 of these technical specifications;
- Developing a competence-based framework for career guidance staff, as described in section 2.3 of these technical specifications;
- Identifying key policy messages, critical success factors and challenges for the professional development of career guidance staff;

- Making a proposal for a seminar on the qualifications of career guidance staff to be organised by Cedefop, based on the findings of the study;
- Circulating the draft version of the study, in particular the competence-based framework, to relevant stakeholders, for validation and feedback;
- Attending three meetings with Cedefop's project manager responsible for guidance:
 - a kick-off meeting a few 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, as well as to discuss the inception report;
 - a meeting to discuss the draft interim report, monitor progress and discuss the interim findings and key messages of the study;
 - and a meeting to discuss the draft final report and agree the final version of the publication;
- as well as presenting the key findings and messages of the study in a seminar on the qualifications of guidance counsellors to be held on the last quarter of 2008 (and in other events, if requested by Cedefop).

Considering the complexity of the study, the contractor will be advised to rely on a team of experts. The contractor is advised to assemble the team necessary to execute, manage and coordinate the study.

Throughout the completion of these tasks, the contractor will consult closely with Cedefop's project manager for guidance.

2.5 Deliverables, reports and timetable (outcome)

The Contractor is required to submit:

- **an inception report, one month after the date of signature of the contract, detailing the methodology of the study and the data sources to be consulted;**
- **an interim report, within four months of the date of signature of the contract, which will include:**
 - intermediary findings on the cross-country analysis, indicative conclusions and recommendations;
 - a short description of the methodology, the work carried out until then, and the data sources that have been used;
 - the tools developed for data collection and analysis;
 - a brief description of the organisation of the study and an updated work plan and timetable;
 - information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
 - as well as, the proposed structure of the final publication.

- a **draft final report**, within 8 months of the date of signature of the contract, and a **final report** within 10 months of the date of signature, following the guidelines provided in these Technical Specifications and including:

- an executive summary highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document,
- presentation of findings, including examples of interesting policies and practices;
- a competence-based framework;
- recommendations to EU/National/regional policymakers, training organisations, professional associations on the conditions to successfully support the appropriate training and professional development of guidance staff;
- suggestions for a peer learning activity or a seminar (as an annex), including the structure of sessions, themes to be discussed, working methods, and potential speakers with their contact details;
- annexes, such as a bibliography, research tools, a full description of the methodology and the work carried out.

Cedefop will provide comments on both the interim and the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study (final report).

The Contractor will submit the study in English, in hard copy and in electronic format (Word). The electronic files should correspond fully to the hard copies. Tables, figures, graphs created should also be made available as separate files and include the data used in order to reproduce the figures.

The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop’s style manual (see Annex G of the Tendering Specifications).

2.6 Meetings and travel expenses

The contractor will be requested to attend three scheduled meetings at Cedefop, as referred in point 2.4.

All costs incurred, including travel-accommodation related to Cedefop’s meetings as well as any travel expenses that may occur in performing the tasks as described in point 2.4, have to be included in the financial offer (see point 5.4).

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

3 Specific information concerning participation to this tender

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a definitive judgement;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a definitive judgement for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Means of proof required

The tenderer shall provide the self-declaration found in Annex C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

Cedefop reserves the right to check the situation described in points c) and f).

3.2 Selection criteria

The tenderer must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

Economic & Financial capacity

Requirement

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

Proof of economic and financial capacity may in particular be furnished by **one or more** of the following documents:

- appropriate statements from the banks or evidence of professional risk indemnity insurance;
- balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

In case tenderers are unable to furnish such documents they are required to provide justification for non provision.

Technical and professional capacity

Requirement

The Tenderer must provide evidence of technical and professional capacity and must therefore comply with the following criteria:

- qualifications, knowledge and ability of the contractor(s) and the key expert(s) to perform the tasks outlined in sections 2.3 and 2.4 of these technical specifications;
- extensive professional experience in career guidance (experience in relation to qualification standards and competence-based frameworks will be an asset);
- proven experience in transversal and comparative analysis in the field of guidance and counselling;
- linguistic ability to draft to a high standard in English.

The following documents or information must be presented as evidence of compliance with the above criteria:

- detailed CVs of the Contractor and, if applicable of the research team members with a brief description of professional experience in the field of career guidance, research publications related to career guidance, including evidence of experience in comparative studies at European level, language qualifications;
- a list of major contracts/studies performed in the last three years with dates and commissioning authorities;
- list of publications of the Contractor/research team members;
- description of measures employed to ensure the quality of services;
- an indication of the proportion, if any, of the contract that the Contractor may intend to subcontract.

3.3 Legal Position

Tenderers are requested to complete the Legal entity form found in Annex D and to provide the documents requested in the form. Tenderers must ensure to include the name and function of the individual(s) entitled to sign on behalf of the organisation in the case of contract award.

4 Additional information concerning participation to this tender

4.1 Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such grouping (or consortia) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a tender.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria 'technical and professional capacity', the evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

If awarded, the contract will be signed by the company or the person heading the project who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract. Tenders from consortia of firms or group of service providers, contractors or suppliers, must specify the role, qualifications and experience of each member or group.

4.2 Subcontracting/Subcontractors

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the tenderer's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. The subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition. If awarded the contract will be signed by the Tenderer, who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

The tenderer must indicate clearly, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 10% of the work by value.

All subcontractors must provide the required evidence for the exclusion and selection criteria.

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

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 (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the total points for quality by the price, thus indicating which tender represents the best value for money.

5.1 Technical evaluation

The tenders will be evaluated according to the following criteria and points scored for each criterion. Due to the high level of specialisation required to carry out the study, great weight will be given in the selection process to the general understanding of the context and the nature of the tasks.

- Award criteria 1 – **The level of understanding of the nature of the assignment**, its context and results to be achieved (40 points)
 - Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake, in particular, policies, developments and challenges related to the professional development of career guidance staff (20 points);

- Relevance of the proposal to the objective of the contract, level of understanding of the nature of the work, its context and results to be achieved (20 points).
- Award criteria 2 – **The adequacy and relevance of the methodological approach to carry out the work** (30 points)
 - Appropriateness of the methodological approach suggested to carry out the analysis (envisaged steps, research methods and tools, data sources to be used) in accordance with the requirements outlined in these Technical Specifications (30 points).
- Award criteria 3 – **Appropriateness of organisation and management of the work** (30 points)
 - Organisation of the work, allocation of tasks, type and degree of involvement of the proposed research team members (15 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) (15 points).

Tenders scoring less than 65 (of a maximum of 100) points against the technical criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2 Technical proposal

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 technical specifications.

Tenderers must therefore submit a full dossier in compliance with these specifications. The technical quality of the bids will be assessed with regard to the ability of the tenderers to meet the purpose of the contract as described in 2.2, 2.3 and 2.4 above.

Tenderers should explain their conceptual approach for undertaking the work. They should clearly define the required analysis, the issues to be addressed and the nature of the outcome to be achieved. Tenderers should also describe the way in which the analysis will be undertaken (i.e., the various steps envisaged, the documentary efforts to be undertaken, the methodological approach for the collection of data), and the process to develop the competence-based framework for guidance practitioners. Tenders will also be required to provide information about organisational aspects related to the compliance of the contract.

To this regard, tenderers must provide the following documents and/or information to allow the evaluation of their offer according to the technical criteria mentioned above.

- a detailed description of the rationale and conceptual approach underlying the study, including:
 - a brief discussion paper demonstrating in-depth understanding of the subject and the purpose of the contract, with detailed research questions and hypotheses underlying the study;
 - a complete description of the envisaged analysis approach and research tools, including a list of potential data sources to be used and key reference institutions/experts;
- a comprehensive description of the development stages for the analysis and the process of drafting the competence-based framework, including:

- organisation of the work and management arrangements,
- a list of team members together with an explanation of the nature and extent of their participation in the work;
- a detailed work plan illustrating intended organisation and management of the work, including a timetable, key development stages and milestones, tasks allocated to the proposed experts and expected deliverables, as described in the Technical Specifications.

Considering the complexity of the tasks, it will be advisable to rely on a team of experts located in different European countries or a network of correspondents to gather the information on national training systems and other key initiatives, such as qualification standards and accreditation of guidance staff.

In addition to the above the tenderer must clearly specify which parts of the work will be sub-contracted (if any) and the identity of all subcontractors undertaking more than 10% of the work by value as requested in point 4.2 (second paragraph).

5.3 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **total price (a+b)** offered in table 1 – Price schedule table (see point 5.4). Where a maximum budget is mentioned in these tender specifications, any tenderer submitting a financial proposal exceeding this budget will be rejected.

5.4 Financial proposal

The financial proposal should indicate the total price in order to carry out all the activities indicated in the technical specifications. The tenderers must fill in the following table 1 - price schedule table and present a detailed breakdown of the price offered.

Table 1: Price schedule table (all fields are mandatory)

	Services	Price
a)	Total price to carry out all the activities	(1) Number of person-days : (2) Price per person- day : Total amount = (1) x (2) :
b)	Attending meetings (see point 2.6) (indication of total amount for all the meetings)	
	Total price (a+b) :	

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.

- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract in Annex B).
- Under article 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 may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

6 Information on presentation and content of tender

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should note the instructions indicated in the invitation letter of this tender.

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

6.1 Envelope A - Supporting documents

One original and one copy of:

- the checklist found in Annex F
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in point 3.2
- the legal entity form found as requested in point 3.3 and found in Annex D
- a statement containing the name and position of the individual(s) entitled to sign the contract as requested in point 3.3
- the financial identification form as found in Annex E

6.2 Envelope B – Technical proposal

One original signed unbound copy and four bound copies of:

- the technical proposal providing all information requested in point 5.2 including information relevant to subcontracting as requested in point 3.2

6.3 Envelope C – Financial proposal

One original signed unbound copy and four bound copies of:

- the financial proposal containing all information requested in point 5.4

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

I hereby declare that neither I nor the company:
(*Company Name*).....

that I am representing are in any of the situations mentioned below:

- a) is bankrupt or being wound up, is having his/her affairs administered by the courts; has entered into an arrangement with creditors; has suspended business activities; is the subject of proceedings concerning those matters; or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a definitive judgement;
- c) has been guilty of grave professional misconduct proven by any means which Cedefop can justify;
- d) has not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which he/she is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a definitive judgement for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, he/she has been declared to be in serious breach of contract for failure to comply with his/her contractual obligations.

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

- is subject to a conflict of interest;
- is guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Signature:

Date:

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal status of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/ftiers_en.htm

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

<u>Mandatory</u> 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: This checklist		<input type="checkbox"/>	<input type="checkbox"/>	
exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	3.1, 4.1 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
legal entity form	3.3	<input type="checkbox"/>	<input type="checkbox"/>	
name and position of the individual(s) entitled to sign contract	3.3	<input type="checkbox"/>	<input type="checkbox"/>	
financial identification form	6.1	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u> one original and four copies of:				
the technical proposal.	5.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original four copies of:				
The financial proposal	5.4	<input type="checkbox"/>	<input type="checkbox"/>	

You should also ensure that:

<input type="checkbox"/>	your 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 you or your duly authorised agent.
<input type="checkbox"/>	your offer is perfectly legible in order to rule out any ambiguity.
<input type="checkbox"/>	your 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

CEDEFOP STYLE MANUAL