



European Centre for the  
Development of Vocational Training  
Procurement Service

Thessaloniki, 03/09/2007  
PRO/2007/538

**OPEN INVITATION TO TENDER**

**AO/A/AZU/Skillsnet-Supply/010/07**

**‘Medium-term forecast of skills supply in Europe’**

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 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 **15.10.2007** 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](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.*

- (b) delivered by hand not later than **17h00** on **15.10.2007** 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:

**OPEN INVITATION TO TENDER**  
**CEDEFOP No: AO/A/AZU/Skillsnet-Supply/010/07**  
**‘MEDIUM-TERM FORECAST OF SKILLS SUPPLY IN EUROPE’**  
*Name of tenderer*  
**NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE**

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 **24.10.2007, 11h00** (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,

signed G. Paraskevaïdis  
Head of Finance and Procurement

Attached: Tender Specifications

# **OPEN INVITATION TO TENDER**

**AO/A/AZU/Skillsnet-Supply/010/07**

**‘MEDIUM-TERM FORECAST OF SKILLS SUPPLY IN EUROPE’**

## **Tender Specifications**

## Table of contents

<b>Introduction to Cedefop .....</b>	<b>3</b>
<b>1 Overview of this tender .....</b>	<b>4</b>
1.1 Description and type of the contract.....	4
1.2 Place of delivery or performance .....	4
1.3 Division into lots .....	4
1.4 Variants .....	4
1.5 Value or quantity of purchase.....	4
1.6 Validity of tenders .....	4
1.7 Duration of the contract.....	4
1.8 Main terms of financing and payment.....	4
<b>2 Technical specifications .....</b>	<b>5</b>
2.1 Background and rationale.....	5
2.2 General purpose.....	6
2.3 Description of the tasks .....	7
2.4 Deliverables.....	8
2.5 Reports and timetable.....	8
2.6 Meetings, travel and other expenses.....	9
<b>3 Specific information concerning participation to this tender .....</b>	<b>10</b>
3.1 Exclusion criteria.....	10
3.2 Selection criteria.....	11
3.3 Legal Position.....	12
<b>4 Additional information concerning participation to this tender .....</b>	<b>12</b>
4.1 Participation of consortia.....	12
4.2 Subcontracting/Subcontractors.....	12
<b>5 Award of the contract.....</b>	<b>13</b>
5.1 Technical evaluation.....	13
5.2 Technical proposal .....	13
5.3 Financial evaluation .....	14
5.4 Financial proposal .....	14
<b>6 Information on presentation and content of tender.....</b>	<b>15</b>
6.1 Envelope A - Supporting documents.....	15
6.2 Envelope B – Technical proposal.....	15
6.3 Envelope C – Financial proposal.....	15

### ANNEXES:

Annex A:	Medium-term forecast of occupational skill needs in Europe: methodology used
Annex B:	Medium-term forecast of occupational skill needs in Europe: detailed structure of the expected results and data output
Annex C:	Contract Notice
Annex D:	Draft Contract
Annex E:	Declaration on Exclusion Criteria
Annex F:	Legal Entity form
Annex G:	Financial Identification Form
Annex H:	Financial Proposal
Annex I:	Check List of Mandatory Documents
Annex J:	Cedefop's 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 and type of the contract

- a) Title of the contract: **‘Medium-term forecast of skills supply in Europe’**
- b) Cedefop is seeking to conclude a contract with a researcher or research team to develop and carry out a medium-term forecast/projection of the supply of skills (based on available data covering all 27 EU Member States, plus Norway and Switzerland) and a comparison with the medium-term forecast of occupational skill needs at European level.
- c) The type of contract is a service contract.

### 1.2 Place of delivery or performance

The tasks must be completed externally, at the Contractor’s premises.

### 1.3 Division into lots

This invitation to tender is not divided into lots.

### 1.4 Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications.

### 1.5 Value or quantity of purchase

Maximum budget available for this activity is **200 000 EUR**.

### 1.6 Validity of tenders

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

### 1.7 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, i.e. Cedefop and shall be valid for a period of **18 months**.

### 1.8 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 Background and rationale

This invitation to tender is being issued against the background of a growing interest in the early identification of skill and competence needs, which is reflected in Cedefop's medium-term priorities 2006-08. New and changing skill needs have important implications for the provision of appropriate and future-oriented education and training. They constitute challenges for policy, practice and research in their attempt to achieve wider social and economic goals, particularly the cohesion and competitiveness of the European Union, and to improve the links between education, training and the labour market. Interest in the early identification of skill and competence needs is therefore growing but there are potential problems that may arise if future skill needs do not correspond with the future skills of the labour force (supply side).

The lack of information about future skill needs has been a long-standing concern in Europe. The need to anticipate skill and occupational needs is reflected in the *Maastricht Communiqué*<sup>(1)</sup>, in the *European Council's integrated guidelines for employment for 2005-2008*<sup>(2)</sup> (Guidelines Nos 19, 20 and 24), and is a priority in the *Social partners' framework of actions for the lifelong development of competencies and qualifications*<sup>(3)</sup>. European integration and EU enlargement makes the provision and availability of information about trends in the development of skills and competences even more important. Relevant findings could support both the development of a European knowledge-based society and the achievement of objectives set out in European employment and lifelong learning strategies.

#### Cedefop's work in the field of analysis, anticipation and identification of skill needs

In 2002, Cedefop, together with a number of researchers and stakeholders from EU and future Member States, launched an initiative on the 'Early identification of skill needs in Europe', documented by conferences and publications. The main aim was to make European activities in the field more transparent and to present and discuss those activities with representatives from the fields of research, policy and practice. In the medium term, its aim was to foster cooperation and to establish a network. As a result, the international network on early identification of skill needs 'Skillsnet' was launched by Cedefop in 2004 (see the Skillsnet website on Cedefop's European Training Village <http://www.trainingvillage.gr/skillsnet/>).

#### Skillsnet – International network on early identification of skill needs

Skillsnet brings together experts and stakeholders to present and discuss research and analysis methods and outcomes in the field of new and changing skill needs as well as the medium- to longer-term perspectives for skills in the labour market. Particular attention is paid to skill needs in regions, sectors, companies and occupations. The network provides a forum where new activities and projects to identify skill needs at an early stage can be generated in a multidisciplinary cross-country perspective. As transferring findings into policy and implementing reforms is of central importance, Skillsnet actively involves policy-makers, social partners, practitioners and researchers in discussions on research outcomes. This is to ensure the acceptance and legitimacy of reforms and to foster their implementation.

Skillsnet serves as a useful platform for dialogue and information exchange among stakeholders. This platform helps to verify different methods of and approaches to anticipating and identifying skill needs. The network discusses the results of research and summarises the main trends and developments in skill needs in Europe, including those in particular sectors. It also seeks to identify and disseminate examples of good practice and to transfer research results into policy and practice. In addition, Skillsnet organises thematic workshops and conferences (e.g. on

<sup>(1)</sup> [http://ec.europa.eu/education/policies/2010/vocational\\_en.html](http://ec.europa.eu/education/policies/2010/vocational_en.html)

<sup>(2)</sup> [http://eur-lex.europa.eu/LexUriServ/site/en/oj/2005/l\\_205/l\\_20520050806en00210027.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2005/l_205/l_20520050806en00210027.pdf)

<sup>(3)</sup> <http://www.etuc.org/a/580>



innovative approaches and methods and initiatives in different sectors) and publishes and disseminates research results.

### Medium-term forecast of occupational skill needs in Europe

In October 2005, Skillsnet/Cedefop organised an expert workshop exploring the feasibility of a pan-European skill needs forecasting approach. All participants agreed on the relevance and desirability of such an exercise and asked Cedefop to continue with this initiative<sup>(4)</sup> and coordinate further steps.

Subsequently, in 2006, Cedefop entrusted a research team coordinated by the Institute for Employment Research at the University of Warwick to carry out a *Medium-term forecast of occupational skill needs in Europe*. The main aim of this European skill/occupational forecast is to provide the various actors and participants in the labour markets, including policy-makers, with useful evidence on future labour-market developments and in particular on the skills and occupations that will be required. The forecast is produced for EU-25, Norway and Switzerland. It is however foreseen that the forecast will be developed for all MS - incl. Bulgaria and Romania - in the near future.

Preliminary results of the study demonstrate the feasibility of producing a regular and consistent set of pan-European projections. This has been discussed at two workshops with the research team carrying out the forecast (the Warwick Institute for Employment Research (IER), Cambridge Econometrics (CE) and the Research Centre for Education and the Labour Market (ROA)) and a panel of national experts from EU-27, Norway and Switzerland.

Cedefop's present forecast activities are limited to the demand-side of skills. In order to anticipate possible future imbalances on European labour markets, and to inform policy makers and other actors in time, it is deemed necessary to complement the demand forecast by a supply-side projection of the future skills of the labour force. A comparison between skill supply and demand could indicate possible imbalances, e.g. shortage and surplus qualifications and occupations in the medium to long term.

## **2.2 General purpose**

The purpose of this contract is to proceed further with the forecasting activities at pan-European level. To this end, Cedefop is seeking to conclude a contract with a researcher or research team to identify and analyse the current skills of the labour force and to develop and carry out a medium to long-term forecast (10-15 years) of the supply of skills in Europe based on available comparative data and covering all 27 EU Member States, Norway and Switzerland. The data should be verified and complemented (where necessary) by the data from national sources with the help of the expert panel representing all involved countries. For this purpose the potential contractor may use the established expert panel in the framework of the project on the medium-term pan-European forecast of occupational skill needs. This panel can be adjusted/modified according to the needs for the expertise provision on the supply-side data. Cedefop will assist the potential contractor with panel establishment and with the coordination of the panel work. In a last step, the results should be compared with those of the pan-European demand-side projection described above and indications be given on the interpretation of imbalances, if they occur.

The expected output should be:

- Current state of art and forecast of the skills profile (specific qualifications/education levels) of the labour force for the next 10-15 years in all Member States. The levels of educational attainment (ISCED) should be as detailed as possible. This skill supply forecast should include the residual supply and the new supply. It should as far as possible be compatible with the skill demand (expansion and replacement) forecast in

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<sup>(4)</sup> This initiative respects the needs of Member States and does not affect the subsidiarity principle: Pan-European skill needs forecasting will not replace existing national forecasting systems. It is a voluntary exercise intended to complement, rather than replace, national forecasting.

terms of individual countries as well as aggregated to the level of EU-27 plus Norway and Switzerland. It should also include the calculation of several variants/scenarios based on different assumptions. The detailed structure of the expected output of the demand-side forecast is attached in Annex B.

- Methodological explanations and/or theoretical assumptions on the allocation of the supply by levels of education/qualification to individual occupations and eventually industrial sectors. Here, it should be considered that – formal – levels of educational attainment/qualifications can be regarded as more or less invariable characteristics of individuals, whereas the allocation to occupations and sectors may change over time for various reasons. A simple assignment of qualifications, occupations and sectors, as observed in the past, may not hold in view of rapid occupational and sectoral change.
- An indication and interpretation of possible imbalances between skill supply and demand in the coming 10-15 years by level of education and eventually occupations/sectors with a view to alert about shortage and surplus skills/occupations and indicate labour market prospects for qualifications and skills levels.
- Additionally the contractor should suggest how the forecasts (both demand and supply-side) can be further developed in the future from methodological and data-input points of view and which concrete steps should be taken for future work<sup>(5)</sup>.

### 2.3 Description of the tasks

The tasks of the Contractor will be:

- (a) to review existing approaches to supply-side forecasts/projections and to propose an appropriate and state-of-the-art method which can yield the most reliable results at European level, taking into account the data limitations and comparability constraints;
- (b) to suggest how the approach of the demand-side forecast and its methodology could be taken into account (see description of the method in Annex A), so that the interplay between the two forecasts can be grasped in the best way;
- (c) to review data sources and assess the quality of available data including measures to be taken to adjust them if necessary;
- (d) to carry out a quantitative medium-term (10-15 years) forecast/projection of the supply of skills broken down by skills level for the EU-27 as a whole and for each Member State (plus Norway and Switzerland), with different variants based on different assumptions, which have to be described in detail;
- (e) to allocate the skill supply by occupations and – optionally – industrial sectors while taking into account occupational/sectoral change and mobility processes;
- (f) to compare the results of the demand and the supply forecasts and to indicate the nature and scope of possible skill imbalances/mismatches in the medium-term in terms of, for example, possible shortage and surplus skills/occupations and labour market prospects for qualifications and skills levels;
- (g) to produce a report, including a detailed description of the methodology, software and data used, and of the results and conclusions for policy-making;

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<sup>(5)</sup> It is envisaged that the forecast should not be a one-off experience. To the contrary the forecast should ideally be repeated every 2-3 years – subject to availability of resources – allowing for catching discrepancies between the forecast and the real development on the labour market. This should also allow to develop further the applied method and the used data sets for a more reliable and robust results in the future.

- (h) additionally the contractor should suggest how the forecast (both demand and supply-side) can be further developed in the future from methodological and data-input points of view and which concrete steps for the future work should be taken.

In the response to the present tender the potential Contractor is expected to provide, among others, specific information on the method of the supply-side forecast/projection to be employed and the description of data sources and structures (including classifications) which will be in use.

## 2.4 Deliverables

The final deliverables for this contract will be:

- *an executive summary* (approx. 5 pages) presenting the main findings and recommendations for policy-making;
- *a comprehensive summary report* presenting the approaches and results of the forecast/projection for Europe as a whole and for each of the 27 Member States, Norway and Switzerland (approx. 60-80 pages). Projections should include several variants/scenarios based on different sets of assumptions. The report should include:
  - indications of future skill supply by occupations and industrial sectors taking into account occupational/sectoral change and mobility processes;
  - indications of possible imbalances between future skill/occupational supply and demand for each of the 25 Member States plus Norway and Switzerland. The report should highlight the main trends according to different variants and include all tables;
  - conclusions and recommendations for policy making;
  - recommendations for future steps to be carried out in skill needs forecasting, i.e. possible updates and suggestions for the longer-term perspective, incl. collaboration with EU Member States.
- *a background report* with detailed results (for Europe as a whole and each of the 27 Member States, Norway and Switzerland) as well as a detailed description of the methodology, including the software (forecasting tool) and data used to ensure possible replication of the forecast in the future.

## 2.5 Reports and timetable

### Short inception report

The short inception report is due 1 month after the kick-off meeting and will in particular confirm and/or clarify the rationale of sources to be used, the methodology, the workplan and timetable for the research.

### Interim report

An interim report is due 5 months after the date on which the contract is signed by the last contracting party, and it will present work progress, the structure of the final outcome, intermediary findings and indicative conclusions (if possible).

### Final report

The final report based on the deliverables mentioned above must be delivered within 12 months of the date on which the contract was signed by the last contracting party and should include a summary and key findings, a detailed presentation of the methodology and results, conclusions and recommendations (see 2.4 above).

Cedefop will provide comments on both the interim report and the final report. The contractor will address those comments, liaising closely with Cedefop's project manager.

Payment of the balance is conditional on Cedefop's acceptance of a revised final report.

The contractor is required to submit the report in English and according to Cedefop's Style Manual. All reports and deliverables will be submitted in hard copy as well as on CD-ROM or by e-mail in Word. Figures and tables should also be delivered separately in Excel or in Word, as appropriate. Excel charts should include the data used in order to reproduce the chart. Electronic files must correspond fully to the hard-copy version.

The final report will be published by Cedefop; related production costs are not subject of this contract.

### Summary timetable for the reports

The contractor is required to submit:

- the inception report 1 month after the kick-off meeting
- the interim report within 5 months of the date on which the contract is signed
- the final report 12 months after the date on which the contract is signed

## **2.6 Meetings, travel and other expenses**

2.6.1 The contractor should be prepared to visit Cedefop for a kick-off meeting (one working day) and one additional meeting in the course of the contract (one working day). All costs incurred, including travel, accommodation etc. of these two meetings shall be fully borne by the contractor and shall be included in the financial offer (see also point 5.4).

Expenses that may be incurred in accessing any statistics and/or data, including microdata, are part of this contract and must be included in the financial offer<sup>(6)</sup>.

2.6.2 The contractor may be asked to present the proposal and results achieved so far during the Skillsnet conferences/expert workshops on European skill needs forecasting. This will enable the contractor to discuss the methodology with European experts in the field.

Travel expenses for Skillsnet conferences/expert workshops and other meetings with Cedefop apart from those mentioned above that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex D).

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<sup>(6)</sup> More information on the access of Eurostat data/microdata is available at Eurostat website:  
[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1913.47567825.1913\\_47567846&\\_dad=portal&\\_schema=PORTAL](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1913.47567825.1913_47567846&_dad=portal&_schema=PORTAL)

### 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 court 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 court 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 E which states that none of the aforementioned grounds for exclusion applies to the tenderer.

In case of recommendation for contract the tenderer may be requested to provide the following documentation:

- Cedefop will accept, as satisfactory evidence that the tenderer is not in one of the situations described in point a), b) or e) above, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- Cedefop will accept, as satisfactory evidence that the Tenderer is not in the situation described in point d) above a recent certificate issued by the competent authority of the State concerned. Where no such certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

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 comply with the following criteria:

- ✓ qualifications, knowledge, skills and ability of the team to perform the required tasks;
- ✓ professional experience in the areas covered by this contract, attested by a list of scientific publications and a list of research projects;
- ✓ experience in work at international level, attested by a list of scientific publications and a list of research projects;
- ✓ capacity to access and analyse data (qualitative and quantitative data at national and international level) and to develop suitable methodology;
- ✓ linguistic ability incl. capacity to understand, speak and write fluently in English.

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

- ✓ presentation and description of the Tenderer;
- ✓ detailed CV(s) of the person(s) in charge of the execution of the tasks, including:
  - a resume of research profile, background and experience relevant to the subject of the contract, incl. evidence of experience in work at international level;
  - a list of publications and projects relevant to the subject of the contract;
- ✓ a list of major contracts, studies and research, performed in the past 5 years, similar to those described in this invitation to tender (indicating the subject, amounts, dates and recipients, public or private);
- ✓ short description of the measures to ensure the quality of services, and a description of the Contractor's study and research facilities to access and analyse data (incl. technical equipment and tools to be used for performing the contract).

### **3.3 Legal Position**

Tenderers are requested to complete the Legal entity form found in Annex F 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 groupings (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 bidder'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 which 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 following technical award criteria will be applied to this tendering procedure:

- Award criteria 1 – Demonstration of an in-depth understanding of the context and general objective of the contract **(15 points)**;
- Award criteria 2 – Demonstration of an in-depth knowledge of the concepts, methodologies and research issues related to the subject of the contract and understanding of the specific objectives and tasks **(15 points)**;
- Award criteria 3 – Adequacy and relevance of the approach and concrete methods proposed, i.e. envisaged steps, data sources to be used, etc. to meet the requirements outlined in the technical specifications **(40 points)**;
- Award criteria 4 – Appropriateness of the workplan, and of the organisation and management of the different activities including organisational approach, working methods, deliverables and degree of involvement of the proposed experts **(25 points)**;
- Award criteria 5 – Relevance of the preliminary assessment of likely difficulties in carrying out the work and proposed actions **(5 points)**.

Tenders scoring **less than 65** (of a maximum of 100) points against the technical award 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. To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

- brief discussion of the subject demonstrating in-depth understanding of the concepts, methodologies and research issues (including brief review of existing methods for forecasting skills supply);
- detailed description of the envisaged approach and methods, including a list of steps, potential data sources, classifications to be used etc.;
- detailed workplan illustrating intended organisation and management of the task including:
  - time-table with descriptions of the deliverables;
  - description of the nature and extent of the team members' participation in the tasks;
- preliminary risk assessment in carrying out the work and proposed actions.



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 price offered. 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 present a detailed breakdown (following the guiding principles below) of the price offered by completing the table in Annex H.

#### **Information concerning price**

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- Other travel expenses for meetings apart from those mentioned under point 2.6.1 that might be needed in performing 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 point 2.6.2 and Annex II of the draft contract in Annex D).
- 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 I
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex E
- the selection criteria documents as requested in point 3.2
- the legal entity form as requested in point 0 and found in Annex F
- a statement containing the name and position of the individual(s) entitled to sign the contract
- the financial identification form as found in Annex G

### **6.2 Envelope B – Technical proposal**

One original signed unbound version 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 4.2.

### **6.3 Envelope C – Financial proposal**

One original signed unbound version and four bound copies of:

- the financial proposal containing all information requested in point 5.4 and the table in Annex H.

## **Annex A**

### **Medium-term forecast of occupational skill needs in Europe: methodology used**

## **Annex B**

### **Medium-term forecast of occupational skill needs in Europe: detailed structure of the expected results and data output**

**Annex C**  
**Contract Notice**

**Annex D**  
**Draft Contract**

## Annex E

### 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) has been convicted of an offence concerning his/her professional conduct by a definitive court 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) has been the subject of a definitive court judgement for fraud, corruption, involvement in a criminal organisation 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 F**

### **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](http://europa.eu.int/comm/budget/execution/legal_entities_en.htm)



## **Annex G**

### **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](http://europa.eu.int/comm/budget/execution/ftiers_en.htm)

#### **PLEASE NOTE :**

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

## Annex H

### Financial Proposal

Expenses	Unit	Units	Unit rate (in EUR)	Costs (in EUR)
1. <b>PERSONNEL</b> (all the categories of staff involved, e.g. project managers, experts, secretaries, etc.)	Per day			
2. <b>MEETING COSTS</b> (estimated n° and costs of all meetings incl. travel and accommodation, etc.; see point 2.6)				
3. <b>OTHER COSTS, SERVICES</b> 3.1 Research costs (e.g. Eurostat statistics and/or data, incl. microdata) 3.2 Other administrative costs				
<b>TOTAL AMOUNT of the Financial Proposal (1+2+3)</b>				

.....  
Signature of the Tenderer or their duly authorised representative

.....  
Name of the person signing above

.....  
Name of the Tenderer, if different from above

*Please note that you can find the financial proposal as a separate annex in word format for your easy fill in.*

## Annex I

### Check List of Mandatory Documents

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

**Please tick (✓) the boxes provided**

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<b>Envelope 'A' must contain:</b>				
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 & Annex E	<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 & Annex F	<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 & Annex G	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Envelope 'B' must contain:</b>				
One original and one copy of the technical proposal.	5.2 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Envelope 'C' must contain:</b>				
One original and four copies of: the financial proposal	5.4 and Annex H	<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 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 J**

### **Cedefop's Style Manual**