



European Centre for the
Development of Vocational Training
Procurement Service

Thessaloniki, 21/12/2007

OPEN INVITATION TO TENDER

AO/A/PLI/VETfinancing/018/2007

‘VET financing mechanisms in selected EU member states’

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 to be dispatched not later than **01/02/2008** 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
Attention of Mr G. Paraskevaïdis
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) or by courier service to be dispatched not later than **01/02/2008** in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip, to the following address:

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

(c) or delivered by hand not later than **17h00** on **01/02/2008** 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
Tel: +30 2310 490 064**

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.

Tenders must be placed **inside two sealed envelopes**. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

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

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

<p>OPEN INVITATION TO TENDER</p> <p>CEDEFOP No: AO/A/PLI/VETfinancing/018/2007</p> <p>‘VET financing mechanisms in selected EU member states’</p> <p>Name of tenderer:</p> <p>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
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The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in point 0 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 **13.02.2008, 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,

G. Paraskevoidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/A/PLI/VETfinancing/018/2007

‘VET financing mechanisms in selected EU member states’

Tender Specifications

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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 (VET).

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) VET financing mechanisms in selected EU member states.
- b) The purpose of this tender is to contract out a study to examine different instruments to finance VET (collective and co-financing mechanisms) in 12 selected EU member states. The study will provide relevant findings as to support evidence-based policy-making.
- c) Service contract

1.2 Place of delivery or performance

The tasks must be completed externally.

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 **48 000 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, and shall be valid for a period of **12 months**.

1.8 Main terms of financing and payment

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

2 Technical specifications

2.1 Introduction

Vocational education and training (VET) – an integral part of lifelong learning – plays a key role in human capital accumulation for the achievement of the EU's economic and social objectives. By raising the knowledge, skills and competences of EU citizens, VET contributes to the core elements of the EU strategy: sustainable growth, competitiveness, innovation and social inclusion.

The *Helsinki Communiqué*¹ highlights the importance of investment in human capital and calls for 'improving public and private investment in VET through the development of balanced and shared funding and investment mechanisms'.

The aim of this study is to examine how the (selected) EU Member States are addressing this VET priority area. The analysis will provide relevant findings to feed into Cedefop policy report² and support evidence-based policy-making.

2.2 General purpose

The purpose of this tender is to examine different mechanisms to finance VET in selected (12) EU Member States. In the focus of the analysis are the collective financing mechanisms (where employers and/or employees and/or social partners cover the costs) and co-financing mechanisms (public-private cost-sharing). The study will make an attempt to evaluate the existing mechanisms in the Member States concerned as well as provide recommendations drawing on the experience of other (EU) countries.

2.3 Description of the tasks

Part I. Provide concise background information on VET financing in 12 member states

- Identify the main stakeholders in financing VET (for each type: initial VET, continuing VET, VET for unemployed) in 12 EU member states and indicate their share in VET funding
- Present key issues of current national policy debate on VET financing; identify trends (shifts in funding, if any), main challenges and future policy priorities.

Part II. Analyse selected VET financing mechanisms in the countries concerned

- Provide a comprehensive overview and typology of existing collective financing mechanisms (where employers and/or employees and/or social partners cover the costs) and co-financing mechanisms (public-private cost-sharing), e.g. levies, tax incentives, others). Specify:
 - name of the financing mechanism, date of implementation
 - regulatory and administrative framework, i.e. legal basis, level of operation (national/ regional/ sectoral/ company/ individual), bodies involved
 - levels of funding with explanation how these are decided upon or negotiated

¹ adopted in December 2006 by 32 Participating Countries, European Commission and Social Partners within the framework of Enhanced European Co-operation in Vocational Education and Training (Copenhagen Process)

² to be presented at the meeting of the Ministers of Education in December 2008, as a background information for review of VET priorities

- the main mechanisms for collection and distribution of funds, criteria for allocation the funds;
 - main policy objective(s)/ target(s) pursued
 - targeted groups (employers, employees, apprentices, unemployed etc.)
 - type of training-related costs covered (direct, indirect)
 - type of training supported
 - changes (if any) in relation to the above in 2006-2008
 - other relevant, important features
- In a comparative perspective, present and discuss the results of evaluations and research carried out on the outcomes of the above financing mechanisms (with particular focus on the last 2-3 years). Examine:
 - extent to which the mechanisms meet their objectives
 - beneficiaries (number and characteristics of individuals, companies)
 - positive and negative impact (how efficiency/equity has been affected; is there deadweight loss/substitution effect? etc.)
 - determinants of success/ failure
 - other relevant, important aspects

Part III. Summarise research findings and draw conclusions and recommendations, incl. examining feasibility of introducing new financing mechanisms in the countries concerned (important part of the study)

- Draw lessons (which financing mechanisms work better, under what circumstances and for whom) and identify best practices
- Identify intentions/ policy plans, pilot projects/ needs to introduce new (innovative) financing mechanisms. Discuss potential benefits of and obstacles to implementing these measures.
- Drawing on the experience and lessons of other (EU) countries
 - recommend how to improve functioning of the existing financial measures in the examined 12 EU countries to ensure well balanced and efficient funding
 - suggest which new measures/ solutions (e.g. vouchers, individual learning accounts, saving accumulation schemes, (income-contingent) loans, etc.) could be applied taking into account political and socio-economic context of the countries concerned.

➤ ***Indications on execution of tasks***

Geographical framework:

The study should cover the following 12 Member States: Bulgaria, Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia, Romania.

Analysis approach:

The Contractor should design a study as a comparative analysis. While giving the priority to the issues comparable across countries, the Contractor can also include country-specific information in the main body of the report where appropriate/ of particular interest. Country reports should be presented in an annex (see 2.4).

Particular attention should be given to 'Part III' of the analysis, namely providing recommendations on how to improve current VET financing arrangements and examining the possibility to introduce new (innovative) partnership financing mechanisms in the countries concerned.

Review of the literature, use of data sources

The research will build on the most recent data, using statistics and surveys at national and international level. The study will present a review of the most relevant literature, including research and policy papers in the field.

The study should build on the following work (providing information on VET financing in the examined 12 Member States):

- Cedefop descriptive information on VET financing (eKnowVet database)
- 'VET financing in the New Member states and the Candidate Countries': Recent trends and challenges; ETF, 2005
- 'Investing in and financing VET in an efficient and sustainable way'; EC, DG EAC study (forthcoming)
- 'Sectoral training funds in Europe'; Cedefop study (forthcoming)

Cedefop will provide the Contractor with further advice on the relevant literature (including information on VET financing in other (EU) countries) in the course of performing the tasks.

2.4 Deliverables and timetable (outcome)

The contractor is required to submit:

- an **interim report** within **3 months** of the date on which the contract is signed
- a **draft final report** within **7 months** of the date on which the contract is signed
- a **final report** within **9 months** of the date on which the contract is signed

2.5 Reports

The contractor is required to submit:

- the interim report of approx. 30 pages which will include:
 - the structure of the final report
 - data sources for countries
 - intermediate findings and indicative conclusions
 - information on problems encountered or risks expected, solutions found or proposed and impact on future work
- a draft final report and a final report of approx. 80 pages (without annex) which will include:
 - an executive summary
 - rationale and description of analysis approach
 - presentation of findings
 - conclusions and recommendations

annex:

- bibliography and list of data used
- full set of data used and other relevant information
- country reports

Cedefop will provide comments on both the interim and the draft final report. The Contractor will take account of these comments in close communication with Cedefop project manager. Payment of the balance is conditional upon acceptance of a revised final report by Cedefop.

The Contractor will submit the reports in English, in hard copy and in electronic format (Word-Excel). The electronic files must correspond fully to the hardcopies. The tables, figures, graphs created in Word/Excel (as appropriate) 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 which will form part of the contract (Annex G).

2.6 Meetings and travel expenses

The Contractor will be invited to participate in two meetings, of one working day each, which will take place in Thessaloniki:

- upon delivery of the interim report to discuss the results
- upon delivery of the draft final report

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 relevant rules (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 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 C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

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

Requirements:

- qualifications, knowledge and ability of the Tenderer and the key experts to perform the tasks outlined in 2.3;
- professional experience in the areas covered by this study;
- experience in comparative studies at international level;
- linguistic ability (to communicate and report on the findings in English).

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

- presentation of the Tenderer
- detailed CV(s) of the key expert(s) and other person(s) in charge of the execution of the tasks, with a brief description of projects and/or publications related to the theme of the study, including evidence of experience in comparative studies at international level
- list of major contracts/studies performed in the past three years similar to those described in this invitation to tender (indicating the subject, dates and recipients)
- description of the measures to ensure the quality of the services and a description of the Tenderer's study and research facilities (incl. technical equipment and tools to be used for performing the tasks).

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 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 – Relevance of the proposal to the objective(s) of the contract;
 - a) Demonstration of understanding of the general objective of the proposed study, its context, nature and results to be achieved **(25 points)**;
 - b) Demonstration of an in-depth understanding of specific objectives and tasks of the study; knowledge of the concepts and research issues related to the study **(25 points)**;
- Award criteria 2 – Adequacy and relevance of the approach suggested to carry out analysis (e.g. envisaged steps, data sources to be used) to meet the requirements outlined in the technical specifications **(30 points)**;
- Award criteria 3 – Appropriateness of the work-plan, organisation and management of different activities related to the study (organisational approach, working methods, type and degree of involvement of the proposed experts, capacity to perform the tasks within deadline given, etc.) **(20 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. 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:

- discussion of the subject demonstrating in-depth understanding of the concepts, research issues to be addressed;
- detailed description of the envisaged approach and methods, including a list of steps potential data sources to be used;
- detailed work-plan illustrating intended organisation and management of the task including:
 - time-table with descriptions of the deliverables (please refer to point 2.4);
 - a list of team members (if applicable) together with an indication of the nature and extent of their participation in the study.

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). Any tenderer submitting a financial proposal exceeding the maximum budget mentioned in these tender specifications 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 (excluding VAT)
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) :	

Please indicate additionally the VAT percentage.

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 relevant rules (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 see point 5.4.**

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 fully respect the instructions indicated under points 2 and 3 of this open invitation to tender.

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

6.1 Envelope A - Supporting documents

One original and one copy of:

- 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 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
- the financial identification form as found in Annex E

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

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) 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 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

PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

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

Please Tick ✓ the boxes provided

<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 & Annex C	<input type="checkbox"/>	<input type="checkbox"/>	
selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
legal entity form	3.3 & Annex D	<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 E	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u> one original and four copies of:				
the technical proposal.	5.2 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original and 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 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'S STYLE MANUAL