



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 05/03/08
RS/PRO/2008/234

OPEN INVITATION TO TENDER

AO/ECVL/JB/ChangingQualifications/002/08

‘The changing role of qualifications in Europe – towards recognition of learning’

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 **10/04/2008** 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. 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) or by courier service to be dispatched not later than **10/04/2008** 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. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490111**

(c) or delivered by hand not later than **17h00** on **10/04/2008** 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 style="text-align: center;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/ECVL/JB/ChangingQualifications/002/08</p> <p style="text-align: center;">‘The changing role of qualifications in Europe – towards recognition of learning’</p> <p style="text-align: center;">Name of tenderer:</p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
--

The inner envelope must also contain three sealed envelopes, namely, **Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”**. The content of each of these three envelopes is described in point 6 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible 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 **22.04.2008, 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. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/JB/ChangingQualifications/002/08

**‘The changing role of qualifications in Europe – towards
recognition of learning’**

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.

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

The changing role of qualifications in Europe – towards recognition of learning

b) Short description of content

This tender outlines a project addressing the existing and changing roles and functions of qualifications (including qualification systems and frameworks) in Europe. The project will aim at creating an overview of the current situation, an analysis of main roles and functions of qualifications and the development of a set of scenarios identifying challenges and choices for the future.

c) Type of contract: 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 **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, 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 of submission of invoices and at the conditions set out in the draft contract.

2 Technical specifications

2.1 Introduction

The purpose of this study is to clarify the existing and changing role of qualifications in Europe. The rapid development of National Qualifications Frameworks, the tendency to weaken the link between qualifications and particular education and training institutions (to include learning outside schools) as well as tendencies towards internationalisation of qualifications may indicate that the character and function of qualifications is changing.

The study should depart from the substantial work already undertaken on qualifications as well as qualifications systems and frameworks in recent years (OECD 2007, ILO, Cedefop 2005, 2006, 2008, EU Commission 2002, 2007). It should also take into account ongoing studies on learning outcomes, qualifications standards and quality assurance of certification currently run by Cedefop. The results of existing theoretical and empirical research should be used to provide an overview in this field and to systematically reflect on the existing and changing role of qualifications.

A multi-disciplinary approach will be preferred as this will allow for a comparison and synergy of different theoretical and empirically founded perspectives in this field. The study could provide an important input to the post-2010 strategy on Education and Training currently being discussed and would make it easier to implement and combine the different tools and initiatives now being introduced at European (EQF and ECVET) and national (NQF, validation) level. The overarching objective will be to contribute to the long term development of a comprehensive strategy on recognition of lifelong learning at national and European level.

2.1.1 The existing character and functions of qualifications

The Recommendation on a European Qualifications Framework (EQF) for lifelong learning (Com (2006) 479) defines a qualification as *'a formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to a given standard.'*

This definition illustrates the complex character of qualifications. They are not only key instruments in communicating the character and profile of the knowledge, skills and competences held by an individual, they also take the form of a currency, signalling the level and value of the learning outcomes in question. To understand the existing and changing role of qualifications there is a need to further elaborate and analyse these main functions of qualifications. Qualifications (and qualifications systems) are used:

- to communicate (codify) the character and profile of specific learning experiences and learning outcomes;
- to signal the level and value of specific learning experiences and learning outcomes (currency);
- for selection of individuals (for education and training, the labour market);
- to regulate supply and demand in education and training;
- as an incentive for learning (formative purposes);
- for monitoring education and training systems (accountability);
- to regulate labour markets (signalling rights to access, pay and status);
- as an instrument for education and training reform.

2.1.2 The changing role of qualifications

While these functions are shared by qualifications systems¹ in many countries, their relative weight and influence varies significantly. This reflects that qualifications have traditionally been deeply embedded in specific social and economic contexts and settings. While still very important (and dominating), the specific national character (and control) of qualifications is challenged. The following points illustrate this:

Lifelong learning is increasingly being seen as a necessity and is (slowly) becoming a reality in many countries. This is not being paralleled by the development of qualifications. Most countries lack coherent approaches to lifelong recognition. Qualifications are mainly about assessing and validating initial learning (predominantly) in formal education and training. Lifelong recognition seems to require an opening of qualifications to a broad set of learning forms and outcomes. Such a development raises fundamental questions as regards the control over qualifications; what will be the future role of education and training providers in awarding qualifications?

Internationalisation/globalisation makes an impact on the definition and use of qualifications. Common markets and technology challenge the traditional national/regional character of qualifications and underline the need for comparison and transfer of qualifications. The internationalisation of qualifications is still at an early stage and seems in most cases to be limited to a certain convergence between qualifications systems. In other cases, however, harmonisation of standards, recognition processes and certificates take place, seriously challenging the specific national character of qualifications. This internationalisation reflects the entrance of new stakeholders in this field. Multinational companies, for example, are introducing their own qualifications and challenging the 'monopoly' of those controlled by national authorities.

Intensified mutual learning between countries (for example in the context of organisations like the EU, ILO, OECD and UNESCO) is gradually making an impact on the way countries define and award qualifications. This cooperation and exchange is important for setting a reform and change agenda. This mutual learning process, contributing to increased convergence, is illustrated by the following common issues:

- Countries are increasingly asking who should control the process of recognition; should it be centralised (and support the monitoring of the system) or should it be decentralised (liberal to newcomers and concentrating on the formative functions);
- The question of how to define qualifications has come to the forefront in recent years; mainly focussing on the need to shift to a learning outcomes based approach;
- How can we avoid the 'exam backwash' ('training to the test'); how can we design recognition processes supporting and not contradicting the learning process?
- How can we improve the ability of qualifications to communicate (codify) the content and profile of the learning process/the learning outcomes to potential users?

¹ We distinguish between Qualifications systems and qualifications frameworks. The definitions used in the EQF Recommendation are the following:

'National qualifications system' means all aspects of a Member State's activity related to the recognition of learning and other mechanisms that link education and training to the labour market and civil society. This includes the development and implementation of institutional arrangements and processes relating to quality assurance, assessment and the award of qualifications. A national qualifications system may be composed of several subsystems and may include a national qualifications framework;

'National qualifications framework' means an instrument for the classification of qualifications according to a set of criteria for specified levels of learning achieved, which aims to integrate and coordinate national qualifications subsystems and improve the transparency, access, progression and quality of qualifications in relation to the labour market and civil society.

- Should the regulatory role of qualifications be weakened or strengthened; will it be possible, in light of rapid changes in markets and technology, to regulate occupations and salaries via qualifications?

These factors promoting convergence are combined with a general and strong realisation that qualifications are powerful levers for change and reform. This is well reflected in current developments of National Qualifications Frameworks where European and international mutual learning and cooperation are closely linked to and interwoven with national reforms.

The current situation as regards European qualifications can thus be described as complex and changing. The existing qualifications systems can be described through a multiplicity of functions. This multiplicity sometimes leads to overload and conflict - although this varies considerably between different countries. This already complex situation is now heavily influenced by the emergence of a strong European and international agenda focussing on 'recognition for life' and globalisation/internationalisation.

2.2 Description of tasks and methodology

Due to a lack of overview and coherent understanding of existing qualifications systems, the political responses to this complex situation have been hesitant and lacking in consistency. However, the recent (2007-2008) proposals (made separately) by the German and French Education and Training Ministries to support the development of European common qualifications in core occupational areas signal that countries are willing to look for alternatives to the traditional, nationally based, approach to qualifications. The strong support given to the launching of the EQF and ECVET by national authorities and social partners signals an acceptance of the need for comparison and transfer of qualifications. Most importantly, the rapid growth of NQFs all over Europe shows that countries now are seriously re-considering the way qualifications and qualifications systems operate.

The current study will respond to the need for overview and a more coherent understanding of the existing and changing role of qualifications in Europe. The study should pursue the following strands of work:

- Provide an overview over existing research in the field of qualifications, paying attention to the multi-disciplinary character of work in this field and how different approaches and perspectives complement and/or contradict each other;
- Describe the current situation as regards the role and functions of qualifications in a representative selection of countries (in depth studies of 12-15 countries) taking part in the Education and training 2010 process; this overview should be based on existing and ongoing² research;
- Analyse in detail the different functions of qualifications/qualifications systems listed above as well as analyse their relationship;
- Describe and analyse how qualifications and qualifications systems are changing; which are the factors influencing and triggering these changes;
- Summarise main lessons and debate possible future options as regards the role of qualifications in our societies with a particular attention to the emergence of lifelong learning and internationalisation/globalisation.

The study should primarily be based on existing, multi-disciplinary research, theoretically as well as empirically oriented, in this field. In cases where lack of information is detected, limited case studies should be carried out in agreement with Cedefop. While an important objective will be to take stock of the current situation in this field, the main challenge lies in a systematic reflection on the changing role of qualifications in Europe. Accordingly:

² In particular, the ongoing research by Cedefop on learning outcomes, qualification standards, quality assurance for certification and curriculum design.

- The study should be concluded by the presentation of a set of scenarios indicating key choices to be made in the coming decade. These scenarios should address policy makers at sectoral, national and European level as well as the research community.
- The project will be given the opportunity, via Cedefop and the EU Commission, to enter into a dialogue and get feedback from the Education and training 2010 cluster on “Recognition of learning outcomes”.

2.3 Deliverables and reporting

The main deliverable will be a **final report** (+/- 150 pages) presenting and analysing main tendencies according to the above (2.2) list of tasks.

A **draft interim report**, presenting the findings from the desk based research, should be delivered 6 months after the signing of the contract. Following comments by Cedefop, a final interim report should be delivered 7 months following the signing of the contract. The **interim report** should be used as a basis for deciding on a strategy of analysis for the final stage of the study.

A **draft final report** should be delivered 13 months following the signature of the contract, a **final report** after 15 months.

2.4 Meetings

The contractor should be prepared to visit Cedefop for a kick-off meeting (one working day) and three additional meetings in the course of the contract (**one working day each**). All costs incurred, including travel, accommodation etc of these **4 meetings of one working day each** shall be fully borne by the contractor and shall be included in the financial offer. (See point 5.4)

2.5 Travel expenses

Other travel expenses for meetings apart from those mentioned under point 2.4 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 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.

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

The Tenderer must comply with the following criteria:

- Qualifications, knowledge and ability to perform the tasks outlined in sections 2.2 and 2.3 of these technical specifications;
- Extensive professional experience in the field of education, training and learning and a particular experience from research on qualifications, qualifications systems and qualifications frameworks;
- Extensive experience of comparative analysis in the field of education and training;
- Experience of working in a multicultural and multilingual environment;
- Linguistic ability to communicate and draft to a high standard in English and communicate in French and/or German;

The Tenderer must provide the following documents of evidence of technical and professional capacity in compliance with the above section:

- detailed CV of the contractor and, if applicable, of the research team members with a brief description of research output/publications related to the issues addressed by this study;
- list of major contracts/studies performed in the past five years with dates, sums and commissioning authorities;
- description of any technical equipment and tools to be employed by the Contractor in the performance of the contract;
- description of measures employed to ensure the quality of services;
- an indication of what proportion, if any, of the contract the Contractor may intend to sub-contract.

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 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 following technical award criteria will be applied to this tendering procedure:

- (A) **The level of understanding of the nature of the assignment**, its context and results to be achieved (40 points)
 - a. The level of understanding of the developments and policies related to qualifications, qualifications systems and qualifications frameworks (20 points).
 - b. The level of understanding of the research challenges (conceptually and methodologically) implied by the assignment (20 points).

(B) The quality and appropriateness of the methods suggested to carry out the work (30 points)

Appropriateness of the chosen research approach and working methods for this assignment; disciplinary approaches to be followed and/or combined, the sequencing and timing of the research process and data sources to be used (30 points).

(C) The organisation and management arrangements (30 points)

- a. Allocation of tasks, type and degree of involvement of the proposed experts (15 points).
- b. 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. To this end, the tenderer must provide the following information to allow evaluation of their offer according to the technical criteria mentioned above;

- a discussion of the subject demonstrating overview as well as in-depth knowledge and understanding of developments and challenges in the field;
- a discussion of the research challenges implied by the assignment,
- detailed description of the envisaged approach, outlining
 - the empirical focus of the research, for example selection of countries, data-sources to be used and informants to be approached;
 - the different steps envisaged in the research process;
- detailed work plan illustrating intended organisation and management of the task including
 - time-table with descriptions of the deliverables (please refer to 2.3);
 - explanation of the nature and extent of the team members participation in the study;
- preliminary assessment of likely difficulties 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 **total price (a+b)** offered in table 1 – Price schedule table (see point 5.4). Any tender containing a financial proposal exceeding the maximum budget mentioned in these tender specifications (see point 1.5) 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	Prices 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 2.4) (indication of total amount for all the meetings)	
	Total price (a+b):	

The above prices are VAT excluded. Please indicate additionally the applicable 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 – see also point 2.5).
- 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 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
<u>Envelope ‘A’ must contain</u> One original and one copy of: This checklist		Yes	No	
		<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 & 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	<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 2 and 3.
<input type="checkbox"/>	the outer envelope bears the information mentioned in the invitation to tender point 3.