

Thessaloniki, 24/03/2008  
RS/PRO/2008/334

## OPEN INVITATION TO TENDER

**AO/ECVL/RLAR/TT-Changing-competences/003/08**

**‘Changing competences for VET teachers and trainers’**

Dear Sir/Madam,

We thank you for the interest you have shown in this tender.

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tendering Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted in one of the official languages of the European Union.
2. Tenders may be submitted:

(a) either by post to be dispatched not later than 05/05/2008 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](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) or by courier service to be dispatched not later than 05/05/2008 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 17:00 on 05/05/2008 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;"><b>OPEN INVITATION TO TENDER</b></p> <p style="text-align: center;"><b>CEDEFOP No: AO/ECVL/RLAR/TT-Changing-competences/003/08</b></p> <p style="text-align: center;"><b>‘Changing competences for VET teachers and trainers’</b></p> <p style="text-align: center;"><b>Name of tenderer:</b></p> <p style="text-align: center;"><b>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</b></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 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 19.05.2008, 11.00 hours (local time). Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

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

- The contracting authority may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.

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

After the opening of tenders:

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

8. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful Tenderer.
9. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
10. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. This decision must be substantiated and the tenderers notified.
11. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaidis

Head of Finance and Procurement

Attached: tendering specifications

# **OPEN INVITATION TO TENDER**

**AO/ECVL/RLAR/TT-Changing-competences/003/08**

**“Changing competences for VET teachers and trainers”**

## **Tendering specifications**

## Table of contents

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

### ANNEXES:

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

## **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: “Changing competences for VET teachers and trainers”
- b) Short description of content: The aim of this invitation to tender is to identify and assess the changing roles and competences of VET teachers and trainers within new paradigms of learning and training. The two main deliverables are: **a competence framework** and **a comparative analysis** of qualifications requirements, training opportunities, challenges and emerging competences of VET teachers and trainers.
- c) Type of contract: service contract related to research and the development of tools.

## 1.2 Place of delivery or performance

The tasks must be completed at the contractor’s premises.

## 1.3 Value or quantity of purchase

Maximum budget available for this activity is 100.000 EUR.

## 1.4 Validity of tenders

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

## 1.5 Duration of the contract

The 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 12 months.

## 1.6 Main terms of financing and payment

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

## 2 Technical specifications

### 2.1 Introduction and background:

#### 2.1.1 Introduction: changing roles of VET teachers and trainers

The key contribution of VET teachers and trainers to the policy goal of enhancing the overall quality of education and training systems is widely acknowledged within Europe. Teachers and trainers are central to the Lisbon agenda <sup>(1)</sup>. Teachers and trainers are increasingly acknowledged as essential to supporting workforce skill development in a lifelong learning perspective.

VET teachers and trainers are changing roles, from the most traditional one of instruction to the more complex one of facilitating learning processes for learners who may differ greatly in terms of learning needs and styles. Within this shift of training paradigm, there is a demand for increased repertoires of organising learning processes and for learner-centred approaches <sup>(2)</sup>. Teachers and trainers' functions are expanding. As learner needs and labour market requirements evolve and become more differentiated, there is a requirement for education and training to move from a supply-led to a demand-led provision. A specific trend of this new learning paradigm is the shift from learning inputs (e.g. number of teaching hours for a given subject) to learning outcomes that define what learners are expected to know and be able to do at the end of the learning process. Learner needs and quality of learning processes are back on stage again, and this has tremendous implications for teachers and trainers professional development <sup>(3)</sup>. The shift of learning paradigm requires new teacher and trainer roles, new pedagogies and new approaches to the training of teachers and trainers. It demands that teachers and trainers possess a new set of knowledge, skills and competences. Urgent action is required at national and European level on their continuing competence development reflecting their specific learning needs and changing roles <sup>(4)</sup><sup>(5)</sup> <sup>(6)</sup> <sup>(7)</sup>.

There is a great diversity across Europe, in the initial training VET teachers and trainers receive, the qualifications required upon recruitment, and the opportunities available for ongoing professional development. In many countries of the EU, however, the profession of VET teacher and trainer is not attractive, not sufficiently recognised and the training provided does not always fully equip them with the skills and competences required in their changing working environments. Moreover, continuous professional development is still rather weak, in a few cases only is compulsory and the participation in CVET does not normally lead to salary increases or career development opportunities for VET teachers and trainers. Updating their knowledge, skills and competences will be of crucial importance for implementing the change of paradigm in teaching.

Developing comprehensive competence frameworks can encourage the professional development of training staff. Competence frameworks describe the core knowledge and skills to be acquired by all practitioners, as well as optional elements reflecting specialised knowledge and skills to be acquired by those who work in specific settings and with different types of users. These can pave the way for new training courses, qualification standards and accreditation processes.

<sup>(1)</sup> For more information on the education and training elements of Lisbon go to: [ec.europa.eu/comm/education/policies/2010/et\\_2010\\_en.html](http://ec.europa.eu/comm/education/policies/2010/et_2010_en.html) and [http://ec.europa.eu/education/policies/2010/objectives\\_en.html](http://ec.europa.eu/education/policies/2010/objectives_en.html)

<sup>(2)</sup> Sören Nielsen, "Teachers in vocational education and training reform", ETF Yearbook, 2007.

<sup>(3)</sup> Peter Grootings, "Discussing National Qualifications Frameworks. Facilitating policy learning in practice", ETF Yearbook, 2007.

<sup>(4)</sup> SEC (2205) 419 of 22 March 2005

<sup>(5)</sup> [http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c\\_079/c\\_07920060401en00010019.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c_079/c_07920060401en00010019.pdf)

<sup>(6)</sup> Common European principles for teacher competences and qualifications, [http://ec.europa.eu/education/policies/2010/testingconf\\_en.html](http://ec.europa.eu/education/policies/2010/testingconf_en.html)

<sup>(7)</sup> Conclusions of the Council on improving the quality of teacher education (2007) <http://register.consilium.europa.eu/pdf/en/07/st14/st14413.en07.pdf>

Competence frameworks can help policy makers to plan training opportunities and assist professionals in their continuous career development planning.

### **2.1.2 Background of this call for tenders: Defining VET professions, a Cedefop's study**

Cedefop plays an important role in the training and professional development of VET teachers and trainers through its Training of Trainers Network – TTnet – a network of national networks set up in 1998 as a pan-European forum for key players and decision makers<sup>(8)</sup>.

In 2005-2006, Cedefop, through its TTnet network, carried out a pilot study covering a restricted sample of professional profiles of VET teachers and trainers. The aim of this pilot study was to analyse roles, responsibilities and competences of VET professions and identify the main trends. The pilot study highlighted the following issues:

- the challenges and demands that VET teachers and trainers are facing are complex and numerous. At the same time, they relate to issues that are common to all countries involved in the study;
- the competence-based approach, which is focused on the analysis of VET teachers' and trainers' activities at work and related competences needed, is a useful way to describe VET professions and to identify the main trends and challenges they are facing;
- in this way, a comparative approach to VET professions seems feasible and allows to make progress in the elaboration of a common framework defining the core activities, trends, new competences and the conditions to be met to successfully support the professional development of VET teachers and trainers <sup>(9)</sup>.

In 2006-2007, TTnet network undertook a follow-up study in a wider sample of countries and professional profiles, as well as a draft competence framework for VET professionals in the EU (a sample of VET profiles is presented in annex, the complete competence framework for all profiles can be provided upon request). Based on the identification of core functions and activities carried out by VET teachers and trainers, the draft framework describes the knowledge, skills and wider competences they require <sup>(10)</sup>. Two different research teams undertook the analysis of IVET and CVET profiles, after agreeing on 5 common research areas (i.e. tasks and responsibilities related to administration, pedagogy, professional development, quality assurance and the establishment and maintenance of networks).

The following VET profiles were identified and analysed:

- **VET teachers and trainers operating within IVET (Initial VET)<sup>11</sup> systems/settings:** principals, teachers, and in-company trainers;
- **VET teachers and trainers operating within CVET (Continuing VET) systems/settings:** In-company trainers and other learning facilitators; CVET providers trainers and teachers (training plan designer, training consultant, Training centre director); as well as e-learning tutors and other net learning facilitators.

---

<sup>(8)</sup>Additional information on TTnet can be found in the networks' website:

[http://www.trainingvillage.gr/etv/Projects\\_Networks/TTNet/](http://www.trainingvillage.gr/etv/Projects_Networks/TTNet/)

<sup>(9)</sup>The results of both the pilot study and the follow-up study are available on request.

<sup>(10)</sup>For the purposes of this study, definitions are taken from the EQF documents.

<sup>11</sup> For the purposes of this study, the concepts of IVET and CVET are taken from Cedefop's thematic database on national VET systems

[\(http://www.trainingvillage.gr/etv/Information\\_resources/NationalVet/\)](http://www.trainingvillage.gr/etv/Information_resources/NationalVet/).

## 2.2 General purpose

The aim of this invitation tenders is to identify and assess the changing roles and competences of VET teachers and trainers within new paradigms of learning and training, based on qualitative analysis and desk research, in particular previous Cedefop/TTnet studies (available upon request)<sup>(12)</sup>. The two main deliverables are: a competence framework and a comparative analysis of qualifications requirements, training opportunities, challenges and emerging competences of VET teachers and trainers. Special attention shall be given to the competences that teachers and trainers need in order to implement a pedagogical approach based on learning outcomes.

It is acknowledged that highly qualified teachers and trainers who undertake continuous professional development are key actors to improve the attractiveness and quality of VET. The outcomes of this study will bring forward the policy and institutional debate in this field and will be presented at a major European Conference in early 2009.

## 2.3 Description of the tasks

The contractor will be required to perform the following tasks:

- Identify and discuss key emerging competences related to the shift in learning paradigm (in particular, the learning outcomes approach), using desk research and qualitative interviews.
- Identify and analyse shortcomings related to the professional development of VET staff, and areas which require further policy attention, based on desk research and interviews with key stakeholders.
- Highlight examples of commendable practice and effective policies related to the qualifications and professional development for VET professions across the EU (10 to 15 countries to be proposed by the tenderers).
- Identify key policy messages, critical success factors and challenges for the professional development of VET teachers and trainers. The contractor will formulate a series of recommendations for the different stakeholders concerned with the training and qualifications of VET teachers and trainers.
- Building upon the analysis of VET professions initiated by Cedefop's TTnet (available upon request), carry out a comprehensive comparative analysis of the occupational contexts, including qualification requirements, training opportunities, standards and competence frameworks in the countries covered by the present study, through secondary sources, and interviews with relevant stakeholders.
- Elaborate a competence framework for VET professions, building upon TTnet previous work (see annex), in particular, the contractor will be requested to:
  - formulate knowledge, skills and competences in a consistent, clear, accurate and meaningful way;
  - identify commonalities, i.e. shared functions across VET professions, which should be described in a consistent way;

---

<sup>(12)</sup>Please also consult:

[http://www.trainingvillage.gr/etv/Information\\_resources/NationalVet/Thematic/analysis-comp.asp](http://www.trainingvillage.gr/etv/Information_resources/NationalVet/Thematic/analysis-comp.asp)

- describe the methodology followed in the elaboration of the framework;
- and elaborate some guidelines for users (policy makers, VET providers, teachers and trainers).
- Define procedures and tools for the validation of the competence framework and the analysis of returns.
- Circulate the draft version of both the analysis and the competence framework, to relevant stakeholders, for validation and feedback.
- Attend three meetings with Cedefop's project manager responsible for the teachers and trainers dossier:
  - a kick-off meeting a few weeks after the signature of the contract to fine-tune final planning and methodology to further develop the competence framework and the research analysis;
  - a meeting to discuss the draft interim report, monitor progress, discuss the interim findings and key messages of the study and the improvements to be introduced in the competence framework;
  - and a meeting to discuss the draft final report and agree the final versions of both the study and the competence framework;
- as well as present the key findings and messages of the study in a Conference on VET teachers and trainers jointly organised by the European Commission and Cedefop at the beginning of 2009.

Considering the complexity and the diversity of tasks, the contractor is advised to rely on a team of experts to execute, manage and coordinate the study. In the different development stages, the contractor, under the direct supervision of Cedefop's staff, should work very closely with TTnet national networks. TTnet networks should also be involved in the validation of the competence framework.

## 2.4 Reports, deliverables and timetable (outcome)

Two main deliverables are required: (i) a comparative analysis of qualifications requirements, training opportunities, challenges and emerging competences of VET teachers and trainers, and (ii) a competence framework.

The Contractor is required to submit:

- **an interim report, within 4 months of the date of signature of the contract**, which will comprise:
  - a preliminary comparative analysis of the occupational context of VET professionals in the countries covered by the study,
  - an analysis of emerging roles and competences for VET professionals;
  - the concept and components of the competence framework, including how knowledge skills, and competences will be described;
  - a set of tools and processes for the validation phase.
- **a paper** within 6 months of the date of signature of the contract, to be presented at the Conference on Teachers and trainers, consisting of the background and methodology of

the study, main findings and key policy considerations, illustrated with examples of interesting policies and practices;

- a **draft final report**, within **8** months of the date of signature of the contract, and a **final report** within **9** months of the date of signature, following the guidelines provided in these Technical Specifications and including:

### **1. Comparative analysis**

- an executive summary highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document,
- a comparative analysis including presentation of findings, as well as examples of interesting policies and practices;
- recommendations to EU/National/regional policymakers, training organisations, professional associations on the professional development of VET staff within the new learning paradigm;
- annexes, such as a bibliography, research tools, a full description of the methodology.

### **2. Competence framework**

- an introduction, with a brief presentation of the selected VET professions;
- a competence framework, with a consistent description of knowledge/skills/competences and links to EQF levels;
- an explanation of concepts and terms used;
- guidelines to use the competence framework.

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

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

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

## **2.5 Meeting and Travel expenses**

The contractor will be requested to attend three one-day meetings at Cedefop, as referred in point 2.3.

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 2.3 and 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.

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**

#### Requirements

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

- qualifications, knowledge and ability of the contractor and the research team members to perform the tasks outlined in sections 2.2 and 2.3 of these technical specifications;
- five years of professional experience in the field of VET teachers and trainers' qualifications and professional development at national and EU level;
- proven experience in transversal and comparative analysis in relation to VET teachers and trainers (in particular previous research experience in relation to emerging roles and competences of teachers and trainers, new paradigms of teaching, and the learning outcomes approach);
- and linguistic ability to communicate and draft to a high standard in English.

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

#### Evidence of technical and professional capacity

The following documents must be provided as evidence of technical and professional compliance with the above criteria:

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

### **3.3 Legal Position**

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

## 4 Additional information concerning participation to this tender

### 4.1 Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such 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:

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

- *Award criteria 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (40 points)*
  - Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake (20 points), in particular:

- policies, developments and challenges related to the training and professional development of VET teachers and trainers (and other training related-staff as identified in 2.1) (10 points)
    - Emerging competences and roles of VET teachers and trainers in both IVET and CVET within the new learning paradigm (10 points)
  - Relevance of the proposal to the objective of the contract, level of understanding of the nature of the work, its context and results to be achieved (20 points).
- **Award criteria 2 – *The adequacy and relevance of the methodological approach to carry out the work* (30 points)**
  - Appropriateness of the methodological approach suggested to carry out the comparative analysis (envisaged steps, research methods and tools, data sources to be used) in accordance with the requirements outlined in these Technical Specifications (15 points);
  - Appropriateness of the methodological approach to produce the competence framework for VET professions (envisaged steps, research methods and data sources to be used) in accordance with the requirements outlined in these Technical Specifications (15 points).
- **Award criteria 3 – *Appropriateness of organisation and management of the work* (30 points)**
  - Organisation of the work, allocation of tasks, type and degree of involvement of the proposed research team members (15 points);
  - Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (15 points).

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

## 5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the technical specifications.

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:

- a detailed description of the rationale and conceptual approach underlying the completion of the study, including:
  - a brief discussion paper on the qualifications and professional development of teachers and trainers in the EU, including
    - main developments and challenges related to qualifications, training and professional development of VET teachers and trainers;
    - competences that VET teachers and trainers should possess in the light of the shift in learning paradigm (e.g. the use of learning outcomes),

- a detailed description of the envisaged methodology to carry out the study, including a duly justified proposal for the sample of countries (10 to 15), as well as for the VET profiles to be studied,
- moreover a list of data sources to be used should also be mentioned;
- a detailed description of the development stages, including:
  - a list of team members together with an explanation of the nature and extent of their participation in the work;
  - a detailed work plan illustrating intended organisation and management of the work, including a timetable, with key milestones and deliverables (please refer to 2.3 and 2.4);
  - 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 1.3) 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
<b>a)</b>	Total price to carry out all the activities	(1) Number of person-days: ..... (2) Price per person- day: ..... Total amount = (1) x (2): .....
<b>b)</b>	Attending meetings (see point 2.6 ) (indication of total amount for all the meetings)	
	<b>Total price (a+b) :</b>	

#### Information concerning price

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

- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its 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.

### **5.5 Envelope A - Supporting documents**

One original and one copy of:

- the checklist found in Annex H
- 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

### **5.6 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.

### **5.7 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](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](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**  
**CEDEFOP STYLE MANUAL**

**ANNEX G**  
**A SAMPLE OF COMPETENCE FRAMEWORKS**

## ANNEX H

### CHECK LIST OF MANDATORY DOCUMENTS

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

**Please Tick ✓ the boxes provided**

<u>Mandatory</u> documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u> One original and one copy of: This checklist		<input type="checkbox"/>	<input type="checkbox"/>	
exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	3.1, 4.1 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
legal entity form	3.3	<input type="checkbox"/>	<input type="checkbox"/>	
name and position of the individual(s) entitled to sign contract	3.3	<input type="checkbox"/>	<input type="checkbox"/>	
financial identification form	5.5	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u> one original and four copies of:				
the technical proposal.	5.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original four copies of:				
The financial proposal	5.4	<input type="checkbox"/>	<input type="checkbox"/>	

**You should also ensure that:**

<input type="checkbox"/>	your offer is formulated in one of the official languages of the European Union.
<input type="checkbox"/>	both the technical and financial proposals of the offer are signed by you or your duly authorised agent.
<input type="checkbox"/>	your offer is perfectly legible in order to rule out any ambiguity.
<input type="checkbox"/>	your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
<input type="checkbox"/>	the outer envelope bears the information mentioned in the invitation to tender point 3.