

Thessaloniki, 07/04/2008  
RS/PRO/2008/384**OPEN INVITATION TO TENDER****AO/ECVL/TSK-JB/SectoralQualifications/005/08****‘The relation between sectoral qualifications and the European Qualifications Framework (EQF)’**

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 **19/05/2008** 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 **19/05/2008** 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 **17h00** on **19/05/2008** 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/TSK-JB/SectoralQualifications/005/08</b></p> <p style="text-align: center;"><b>‘The relation between sectoral qualifications and the European Qualifications Framework (EQF)’</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>
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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 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 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 **29.05.2008, 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,

signed G. Paraskevaïdis  
Head of Finance and Procurement

Attached: Tender Specifications

# **OPEN INVITATION TO TENDER**

**AO/ECVL/TSK-JB/SectoralQualifications/005/08**

**‘The relation between sectoral qualifications and the  
European Qualifications Framework (EQF)’**

## **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) The purpose of the study “ The relation between sectoral qualifications and the European Qualifications Framework” is to research the relation between different forms of qualifications; those awarded by national authorities and those awarded outside by sectoral stakeholders, and to analyse the preconditions for developing the EQF into a common reference point for all qualifications.
- b) Type of contract is a 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 **83.000,00 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** after submission of invoices and at the conditions set out in the draft contract.

## 2 Technical specifications

### 2.1 Introduction and background

A Recommendation on the establishment of the European Qualifications Framework for lifelong learning was adopted by the European Council on 14 February 2008<sup>1</sup> following its adoption in October 2007 by the European Parliament. The objective of the Recommendation is “to create a common reference framework which should serve as a translation device between different qualifications systems and their levels, whether for general and higher education or for vocational education and training.” While the main emphasis of the EQF is on the comparison and linking of national qualifications and qualifications levels, the framework could potentially operate as a common reference for all qualifications - including those awarded by sectors and multinational companies. The purpose of the study is therefore to analyse the following two main questions:

- Is there a need, triggered by qualifications developments outside the domain of national qualifications systems or frameworks, to turn the EQF into a reference point also for qualifications awarded by sectors and companies?
- What is required, in terms of mechanisms generating mutual trust, to develop the EQF into a common reference point for all qualifications, including those awarded outside national qualifications systems and frameworks?

These two questions are based on the following assumptions:

Firstly, a diversification of qualifications is currently taking place in Europe. Qualifications are not anymore the exclusive responsibility and property of national education and training authorities but are increasingly involving stakeholders at sector and enterprise level - in many cases operating at European or international level.

Secondly, a diversification may - due to lack of transparency and increasing heterogeneity of providers – threaten the overall credibility of qualifications. Particular concern is expressed, for example by national public authorities, as regards the content and quality of certificates and diplomas issued by sectors and enterprises.

The EQF as a common reference point could, by facilitating comparison and translation, provide a part-solution to this challenge. This requires however that everybody involved trust the way the framework is used and how qualifications – be these public, private, national, sectoral or enterprise based – are referred to the EQF.

#### 2.1.1 Diversification and internationalisation of qualifications

In the EQF Recommendation it is stated that the Commission has a particular responsibility in enabling “international sectoral organisations to relate their qualification systems to a common European reference point and thus show the relationship between international sectoral qualifications and national qualifications systems.”<sup>2</sup>

This focus on international sectoral organisations can be seen as an acknowledgement of an increasing diversification and internationalisation of qualifications. While it is difficult to overview these developments, agreements on common European or international standards for qualifications, the emergence of European or international sectoral qualifications frameworks as well as the growing importance of qualifications issued by multi-national companies, indicate that the basis for and role of qualifications is changing.

<sup>1</sup> Com (2006) 479 / PE-CONS 3662/07

<sup>2</sup> Com (2006) 479 / PE-CONS 3662/07



The emergence of sector or company based solutions may reflect a need for increasing the labour market relevance of qualifications; for providing training and qualifications tailored to the specific needs of the sectors or the companies; for increasing transparency of qualifications and of mutual recognition of certificates, facilitating mobility for workers and improving possibilities for lifelong learning; for facilitating transfer of qualifications and competences acquired in different areas (countries, enterprises, occupations, tasks, levels) for developing systems of establishing and assessing learning outcomes, including non-formal learning; and for making visible transversal knowledge, skills and competence elements.

Stakeholders have reacted differently to these tendencies. Many national education and training authorities are concerned that the development and promotion of qualifications at sector/company and (in particular) international level will reduce transparency, threaten quality and in general undermine mutual trust towards qualifications. Some stakeholders fear that linking these qualifications to the EQF will create a false image of reliability and trust, and thus increase the problems listed above. Sectoral organisations and associations argue on their side that the rapid changes in markets and technology require more flexible and tailored solutions serving the needs of individuals and enterprises better. These stakeholders agree that lack of transparency and trust is a problem today, but see the EQF as an important part of a future solution.

### **2.1.2 The challenge of mutual trust**

A key challenge for EQF is recognised to be that of mutual trust. It is essential that the EQF promotes and strengthens mutual trust between stakeholders. It must be possible for everybody involved to judge the way a qualification is referred to the EQF. If these decisions lack credibility - for example due to lack of transparency or suspicion of unjustified placing/levelling - the value of the EQF as an instrument for comparison and translation will be drastically reduced. This challenge is of particular relevance and importance when addressing qualifications developed and awarded outside of national, public education and training systems.

Qualifications awarded at national level will in most cases refer to national quality assurance systems and consequently be the responsibility of the national qualifications authorities. Increasingly these qualifications are supported by transparent quality assurance mechanisms, for vocational education and training and Higher Education also linked to European agreements. The development of national Qualifications Frameworks also contributes to this transparency and trust. The same is not always the case for qualifications awarded by sectors or companies. While a few sectors (for example in air and sea transport) base international qualifications/qualifications standards on transparent and very rigid regulations, this is not necessarily the case for others.

The diverse and decentralised character of sector and company based qualifications thus raise a number of difficult questions – of a principal and general as well as a practical character. If the EQF is to be developed into a framework addressing all qualifications, how can stakeholders outside national systems and frameworks be included in a credible and trusted way? Two main options present themselves

- indirect link to the EQF via national systems or frameworks;
- directly link to the EQF.

In the first case the same (national) quality criteria would apply to all qualifications. While this in many cases would be the most practical solution<sup>3</sup>, it is possible to imagine cases where sectors or companies would opt for an independent solution. This last alternative raises questions regarding development of independent referencing criteria for sector or company based qualifications, ensuring minimum transparency and credibility. This alternative may be seen as presenting a challenge to the traditional way qualifications are awarded, questioning established roles, interests and rights.

When considering the options for developing the EQF into a framework covering all qualifications, it is important to keep in mind the end-users of qualifications, individual citizens and employers. These end-users need transparency in order to make the best possible use of their knowledge, skills and competences. A system only addressing national, public qualifications would not meet this requirement. This becomes clear when lifelong learning is addressed and citizens combine their initial qualifications with education, training and learning at the workplace or in society at large. As long as these different awards are incompatible to each other they will represent barriers to further learning.

But for the EQF to be used efficiently by sectors and companies it will be important to identify mechanisms which ensure the necessary mutual trust and credibility. The main principle must be that any qualification referred to the EQF must do so in a way which is transparent and credible to all countries and stakeholders involved.

### **2.1.3 Definition of terms**

For the purpose of this study, the following definition of the terms should be applied:

- a) “qualification” - 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 given standards;
- b) “qualification framework” – an instrument for the classification of qualifications according to a set of criteria for specific levels of learning achieved, which aims to integrate and coordinate qualifications and qualification subsystems and improve the transparency, access, progression and quality of qualifications in relation to the labour market and civil society;
- c) “sector” – a grouping of professional activities on the basis of their main economic function, product, service or technology and horizontal occupational category, or as a part of education system, e.g. higher education;
- d) “learning outcomes” – statements of what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and competence.

### **2.1.4 EQF test projects**

The Commission is funding 23 projects testing and supporting development and implementation of EQF in a wide range of sectors and countries.

These projects are a valuable source of information and should be taken into account for the mapping and analysis in this study.

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<sup>3</sup> See for example the experiences from the project “Professionalisation Durable” initiated in 2001 by the French Ministry of education where common European standards (Referentiels) were linked, institutionally and legally, to the national qualifications systems.

## 2.2 Objectives and purpose of the study

The study should contribute to a generally improved understanding of the relationship between different forms of qualifications; those awarded by national authorities and those awarded outside by sectoral stakeholders, frequently operating at international level, and their relation to the EQF.

The study should give an overview and analyse the diversifications and internationalisation of qualifications, in particular illustrated by the emergence of sector or company based qualifications and qualifications frameworks. This mapping should indicate the character and strength of these developments.

Based on the above mapping, the study should analyse the preconditions for developing the EQF into a common reference point for all qualifications, irrespective of whether their origin is national, sectoral, public or private, based on experiences at sectoral level in using the EQF.

The study is expected to outline a range of models on how sectors can use the EQF in a trusted way. This work will in particular focus on quality assurance approaches to support trust between different users of the EQF.

The study will also provide information about how the process to link all forms of qualifications to a common qualification framework influences on the credibility of qualifications, e.g. if we see a tendency that qualifications are being inflated, and the possible consequences for labour market and individuals.

## 2.3 Description of the tasks

The contractor shall carry out the following tasks:

- a) Mapping of the diversification and internationalisation of qualifications and the emergence of sector or company based qualifications and frameworks.
- b) Identify and analyse constraints and benefits when using EQF as a reference point for qualifications awarded outside the national systems.
- c) Identify and analyse how quality assurance mechanisms/frameworks could support sectors and companies and in particular how such mechanisms could be integrated in sectoral qualification frameworks, as well as the cooperation between accreditation bodies at sectoral/company and national level. The analysis shall take into account the Common Principles for Quality Assurance in Higher Education and VET in the context of the EQF (Recommendation Annex III).
- d) Identify and analyse models and practice for the referencing of sector/company qualifications to the EQF. This should consider the integration of sectoral qualifications to National Qualifications Frameworks as well as consider a direct link between sectors/companies and the EQF.
- e) On the basis of the tasks a)-d) above, provide a comprehensive evaluation of models and good practices, and give recommendations for the future development of EQF as a reference point for sectoral qualifications/frameworks and quality assurance mechanisms to be applied making it possible for sectors to use the EQF.

### 2.3.1 Indication on task execution and methodology

The study shall be executed with a qualitative approach, and the analysis shall be a substantial part of the work.

As a complete mapping of the diversification/internalisation of qualifications is impossible given available resources, the tenderer shall propose a limited number of sectors (6-8). These sector cases studies should be used to illustrate ongoing developments and challenges. The selected sectors should be able to illustrate the diversification and internationalisation of qualifications. Possible candidates would be ICT, Construction, Automotive, Banking etc.. The study shall cover both regulated and non-regulated professions.

The contractor shall take into account the approach and outcomes of other Cedefop studies related to EQF and Learning Outcomes, Quality assurance and certification.

The analysis of the referencing of sector or company qualifications to the EQF should take into account the views of stakeholders at different levels (national, sector, company level).

The study should outline a range of possible options for using the EQF as a reference point for all qualifications, including those awarded outside the national public domain.

### 2.4 Reports, meetings and timetable

A kick-off meeting will be organised by Cedefop within few weeks after the contract is signed. The meeting will agree on the methodological approach, the final selection of projects, sectors and countries to include, and other necessary clarifications

- **An interim report should be delivered 6 months after contract is signed.**

Cedefop project managers will meet the contractor to discuss the interim report, and agree on the structure of the final report.

- **A draft final report should be delivered 9 months after contract is signed**

Cedefop project managers will meet the contractor to discuss the draft final report and agree on necessary improvements for the final report.

- **A final report is to be delivered 10 months after contract is signed.**

The final report will reflect the comments mentioned above. The contractor shall submit all deliverables in English, in hard copy and in electronic format. Figures and tables should be delivered separately in Excel or in Word, as appropriate. Excel charts should include the data used to be able to reproduce the charts. The electronic files must correspond fully to the hard-copy version. Lay-out and format of the text –in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (Annex G).

## 2.5 Meeting and Travel expenses

The contractor should be prepared to visit Cedefop for a kick-off meeting (**1 working day**) and two additional meetings in the course of the contract (**1 working day each**).

All costs incurred, including travel, accommodation etc of these **3 meetings of 3 working days in total as well as all other travel expenses that may occur in performing the tasks as described in the technical specifications** shall be fully borne by the contractor and shall 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**

Requirement

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

- Qualifications, knowledge, skills and ability to perform the tasks outlined in the technical specifications;
- Extensive professional experience in the field of qualification frameworks and quality assurance mechanisms/frameworks as well as in sectoral qualifications;
- Extensive experience in comparative analysis at international level;
- Capacity to access data and expertise at national and European level.

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

- 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 and commissioning authorities;
- Description of any technical equipment and tools to be employed by the tenderer in the performance of the contract;
- Description of measures employed to ensure the quality of services;

### 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 level of understanding of the nature of the assignment, its context and results to be achieved **(40 points)**
  - The level of overview and understanding of qualifications developments, in particular at international sector and company level (20 points)
  - The level of overview and understanding of qualifications frameworks and their link to quality assurance (10 points)
  - The level of understanding of the research challenges (conceptual and methodological) implied in the assignment (10 points)
- The quality and appropriateness of the methods suggested to carry out the work **(30 points)**
  - Relevance and appropriateness of the methods proposed, e.g. terminology issues, methodology for data collection and analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (30 points).
- The organisation and management arrangements **(30 points)**
  - Allocation of tasks, type and degree of involvement of the proposed experts (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:

- discussion of the subject demonstrating in-depth understanding of
  - qualifications developments, in particular at sector and company level;
  - the nature and potential challenges implied in the development and implementation of qualifications frameworks as well as their relation to quality assurance;
  - the research challenges - conceptual and methodological – implied by the assignment.
- detailed description of the envisaged approach and methods; it should
  - inform on the potential data sources to be used, in particular by suggesting relevant case sectors/companies to be analysed (see point 2.3.1); by suggesting an analytical approach addressing the link to the EQF and the challenge of mutual trust.
- detailed work plan illustrating intended organisation and management of the task including:
  - explanation of the nature and extent of the team members participation in the study as well
  - preliminary assessment of likely difficulties in carrying out the work, proposed actions required to meet these and proposed time-table with descriptions of the deliverables (please refer to 2.4).

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
<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 2.5 ) (indication of total amount for all the meetings)	
	<b>Total price (a+b) :</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 point 2.5 and Annex II of the draft contract in Annex B).
- Under article 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

## **6 Information on presentation and content of tender**

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should 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](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

### 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 documents to be included as part of the tender</u>	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 & 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 four copies of:				
The financial proposal	5.4	<input type="checkbox"/>	<input type="checkbox"/>	

**You should also ensure that:**

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

**ANNEX G**

**CEDEFOP'S STYLE MANUAL**