



**CEDEFOP**

European Centre for the Development  
of Vocational Training

Thessaloniki, 24/06/2008  
RS/PRO/2008/682

**OPEN INVITATION TO TENDER**  
**AO/RPA/AZU-TODUN/European-skills-forecasts/009/08**  
**“Forecasting skill supply and demand in Europe”**

Dear Sir/Madam,

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

The purpose of this tender and additional information necessary to present a tender can be found in the attached 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 01/09/2007 in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),  
Procurement Service  
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 01/09/2007 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 01/09/2007 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 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 submitted in a sealed envelope itself enclosed within a second sealed envelope. 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/RRA/AZU-TODUN/European-skills-forecasts/009/08</b></p> <p style="text-align: center;"><b>Forecasting Skill and Supply Demand in Europe</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 5 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 15.09.2007, 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 tender documents. 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. Paraskevaïdis

Head of Finance and Procurement

Attached: Tendering Specifications

# **OPEN INVITATION TO TENDER**

**AO/RPA/AZU-TODUN/European-skills-forecasts/009/08**

**“Forecasting skill supply and demand in Europe”**

## **Tendering 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 of the contract

Cedefop will offer a single framework contract to the selected service provider/consortium to develop and carry out forecasts of skill demand and supply in Europe and related analyses.

The framework contract establishes the basic terms for a series of yearly work assignments to be concluded over a period of maximum 4 years (4 x 1 year), particularly as regards the subject, price and implementing conditions.

For each yearly work assignment, an order form will be issued by Cedefop. The order form and its annexes will stipulate the tasks to be performed by the contractor, the timetable, the budget, the human resources/experts to be allocated and, if necessary, the reports to be presented. For each work assignment, the framework contractor will be contacted by email and invited to submit a specific proposal to Cedefop within 25 working days.

The activities envisaged in the course of the framework contract will mainly contribute to Cedefop research on early identification of skill needs and skill mismatch (see description in section 2 ‘Technical specifications’).

In drawing up their bids, tenderers must take account of, and thus accept, the terms and conditions of the standard framework contract attached to the specifications (Annex B).

### 1.2. Place of delivery or performance

The tasks must be completed externally.

### 1.3. Variants

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

### 1.4. Value of purchase

The following estimated total budget is foreseen over the entire duration of the framework contract (maximum 4 years).

<b>Total budget (estimate)</b>	<b>1.900.000 €</b>
2008 work assignment (estimate)	500.000 €
2009 work assignment (estimate)	350.000 €
2010 work assignment (estimate)	550.000 €
2011 work assignment (estimate)	500.000 €

### 1.5. Validity of tenders

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

## **1.6. Duration of the contract**

The resulting framework 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 1 year. It may be automatically renewed up to three (3) times, each time for an additional period of one (1) year, covering an acquisition period of total four (4) years (1+1+1+1).

## **1.7. Start date and period of execution**

As a guide, the scheduled date for entry into force of the framework contract is: 01/10/2008.

The estimated timetable for the performance of the tasks is indicated in point 2.5 but will be specifically stipulated for each work assignment in accordance with Cedefop's needs.

## **1.8. Intellectual property**

Any results or rights, including copyright and other intellectual or industrial property rights, obtained in performance of the Contract, shall be owned solely by Cedefop and the European Commission, which may use, publish, assign or transfer them as they see fit, without geographical or other limitation. Please note that Cedefop shall not be required to distribute or publish documents or information supplied in performance of the Contract.

Documents based in whole or in part upon the work undertaken in the context of the contract may be published by the Contractor given prior written approval by Cedefop.

## **1.9. Main terms of financing and payment**

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

## **2. TECHNICAL SPECIFICATIONS**

### **2.1. Introduction**

This invitation to tender is being issued against the background of widely recognised need and growing interest in the early identification and anticipation of skill and competence needs. New and changing skill needs have important implications for the provision of appropriate and future-oriented education and training. They constitute challenges for policy, practice and research in their attempt to achieve wider social and economic goals, particularly the cohesion and competitiveness of the European Union, and to improve the links between education, training and the labour market.

The future development of skills – both demand and supply – on the European labour market ranks high on the current policy agenda. The re-launched Lisbon agenda emphasises human capital and related investments in education and training as important policy levers to foster growth, employment and competitiveness, together with innovation, research and development. The need to anticipate skill and occupational needs is reflected in the Maastricht and Helsinki Communiqués and is a priority in the Social partners' framework of actions for the lifelong development of competencies and qualifications. Consequently, the Integrated Guidelines for Growth and Jobs 2005-2008, as well as 2008-2010, ask for better anticipation of skill needs, labour market shortages and bottlenecks to improve matching of labour market demand and supply. The Council Resolution 'New skills for new jobs' (2007) stresses the necessity to anticipate skills needs - and skills gaps – emerging in the European labour markets, among other things explicitly by strengthening Cedefop's network for the early identification and forecast of skill needs (Skillsnet). In view of increasing skills shortages in a number of sectors and occupations the 2008 Spring Council concludes to undertake a comprehensive assessment of the future skills requirements in Europe up to 2020, taking account of the impacts of technological change and ageing populations and to propose steps to anticipate future needs.

### **2.2. Cedefop's work in the field of identification of skill needs**

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

#### *2.2.1. Skillsnet – International network on early identification of skill needs*

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

#### *2.2.2. Medium-term forecast of occupational skill needs in Europe*

In October 2005, Cedefop/Skillsnet organised an expert workshop exploring the feasibility of a pan-European skill needs forecasting approach. All participants agreed on the relevance and

desirability of such an exercise. Cedefop was asked to continue with this initiative <sup>(1)</sup> and to coordinate further steps.

Subsequently, in 2006, Cedefop entrusted a research team (the Institute for Employment Research at the University of Warwick, the Research Centre for Education and the Labour Market at the University of Maastricht and Cambridge Econometrics) to carry out a Medium-term forecast of occupational skill needs in Europe. The main aim of this European skill/occupational forecast was to provide various labour market actors and participants, including policy-makers, with useful evidence on future labour-market developments and in particular on the skills and occupations that will be required. The forecast was produced for EU-25, Norway and Switzerland covering the period 2006-2015 with a preview until 2020. It provides data on future employment developments by economic sector, occupation and qualification.

The results were presented and discussed in February 2008 at Cedefop's Agora conference "Skills for Europe's future" and published in a synthesis report <sup>(2)</sup>. A background report is under preparation but its individual parts are accessible via Skillsnet website <sup>(3)</sup>. The results demonstrate the feasibility of producing a regular and consistent set of pan-European projections. The data and results have been verified and discussed at three workshops with the research team carrying out the forecast and a panel of national experts from EU-27, Norway and Switzerland.

### 2.2.3. *Medium-term forecast of skills supply in Europe*

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

Therefore, at the end of 2007 Cedefop launched a new project to identify and analyse the current skills of the labour force and to develop and carry out a medium to long-term forecast (10-15 years) of the supply of skills in Europe based on available comparative data and covering all 27 EU Member States, Norway and Switzerland. The results are expected by the end of 2008. Interim reports are available on Skillsnet website <sup>(4)</sup>.

## 2.3. **General purpose of this contract**

The purpose of this contract is to proceed further with the forecasting activities at pan-European level and to carry out skill forecasts regularly. To this end, Cedefop is seeking to conclude a contract with a research team/consortium to develop a system for regular medium-term forecasts of skill needs (demand and supply) in Europe based on available comparative data and to carry out these forecasts. Levels of detail will depend on the data availability but shall be at least the same as in the forecasts produced by Cedefop in 2007-2008 and cover the time period until 2020. The forecasts shall also respect the structure of previous forecasts providing grounds for continuous time series. Elaboration of different scenarios, including policy/impact scenario, will be expected.

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<sup>(1)</sup> This initiative respects the needs of Member States and does not affect the subsidiarity principle: Pan-European skill needs forecasting will not replace existing national forecasting systems. It is a voluntary exercise intended to complement, rather than replace, national forecasting.

<sup>(2)</sup> Cedefop: *Future skill needs in Europe, Medium-term forecast: synthesis report*. Luxembourg: Office for Official Publications of the European Communities, 2008. Available from internet:

[http://www.trainingvillage.gr/etv/Information\\_resources/Bookshop/publication\\_details.asp?pub\\_id=485](http://www.trainingvillage.gr/etv/Information_resources/Bookshop/publication_details.asp?pub_id=485)

<sup>(3)</sup> [http://www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet/forecasting.asp](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet/forecasting.asp)

<sup>(4)</sup> [http://www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet/forecasting.asp](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet/forecasting.asp)

To be able to continuously improve and refine the methodology and data for consecutive forecasts, it will be necessary to confront the forecasts results against the actual developments on the labour market. Additional related research activities will include development and application of a model on interaction between demand and supply.

## 2.4. Geographical scope and other specifications

The main geographical scope for the project is the European Union Member States (EU-27). However, inclusion of more European (non-EU) countries for which comparable data may be available, in particular EFTA/EEA countries, EU candidate and potential candidate countries, is desirable.

Medium-term forecasts of skill needs and skills supply refer to quantitative projections of skill demand and supply for the next 10-15 years (at least until 2020).

Labour market imbalances refer to positive or negative discrepancies between skill demand and skill supply in the coming 10-15 years by level of education and eventually occupations/sectors. Identification of possible shortages and surpluses of skills/occupations will help to indicate labour market prospects for qualifications and skills levels.

The results in different stages (interim and final) will be discussed at workshops with country expert members of Cedefop's Skillsnet and the contractor will have to take into account relevant comments and suggestions, in particular related to national data. These workshops will be organised by Cedefop and are not the subject of this contract (see point 2.7).

## 2.5. Work assignments, tasks and planning

The work will be divided into four annual work assignments to be carried out, starting in 2008. The work assignments logically follow one after another as they are in most cases dependent on the outcome of the previous assignment. They will be subject to four different order forms. The specific activities within each work assignment, related tasks and years of start are indicated below.

### 2008 WORK ASSIGNMENT

#### **Skill demand forecast**

##### Expected tasks:

- review existing data sources and assess the quality of available data including indication of measures for adjusting them if necessary;
- develop a system/methodology for regular quantitative medium-term forecasts of skill demand (expansion and replacement) in Europe which would be attuned with the skills supply forecast (see below);
- carry out the skill needs/demand forecast with breakdown by economic sector, occupation and skill level or formal qualification/educational attainment (ISCED) and with different variants/scenarios based on different assumptions; the forecast should respect the structure of the previous forecasts to allow for continuous time series <sup>(5)</sup>;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions for policy-making.

#### **Skills supply forecast**

<sup>(5)</sup> More information at: [http://www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet/forecasting.asp](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet/forecasting.asp)

<sup>(6)</sup> More information at: [http://www.trainingvillage.gr/etv/Projects\\_Networks/Skillsnet/forecasting.asp](http://www.trainingvillage.gr/etv/Projects_Networks/Skillsnet/forecasting.asp)

Expected tasks:

- review existing data sources and assess the quality of available data including indication of measures for adjusting them if necessary;
- develop a system/methodology for regular quantitative medium-term forecasts of skills supply (residual and new supply) in Europe which would be compatible with the skill demand forecast;
- carry out the skills supply forecast with breakdown by skill levels - the levels of educational attainment (ISCED) should be as detailed as possible - and with different variants/scenarios based on different assumptions; the forecast should respect the structure of the previous forecasts to allow for continuous time series (<sup>6</sup>);
- explore the allocation of the skill supply by occupations and industrial sectors while taking into account occupational/sectoral change and mobility,
- provide methodological explanations and/or theoretical assumptions on the allocation of the supply by levels of education/qualification to individual occupations and eventually industrial sectors (here, it should be considered that formal levels of educational attainment/qualifications can be regarded as more or less invariable characteristics of individuals, whereas the allocation to occupations and sectors may change over time for various reasons: a simple assignment of qualifications, occupations and sectors, as observed in the past, may not hold in view of rapid occupational and sectoral change);
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions for policy-making.

**Analysis of potential labour market imbalances**Expected tasks:

- compare the results of the demand and the supply forecasts (in quantitative and qualitative terms);
- indicate and interpret the nature and scope of possible skill imbalances/mismatches in the medium term in terms of possible shortage and surplus skills/occupations and labour market prospects for qualifications and skill levels;
- lay ground for the development of a specific methodology for analysing interactions between demand and supply (model on adjustment processes), and how they could be applied to skill demand and supply forecasts;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methods, software and data used, and of the results and conclusions for policy-making (include as a special chapter also recommendations and concrete proposals for the development of the methodology for the analysis of interaction between demand and supply to be implemented in 2010).

**2009 WORK ASSIGNMENT****Policy/impact scenario**Expected tasks:

- develop a special policy scenario with an assessment of the sensitivity of outcomes to key external drivers, policy changes and reforms, which might be implemented at European or/and national levels;
- provide evidence from forecasting results to answer various policy orientated questions about the role of skills and its impact on Europe's strategic development;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology and data used, and of the results and conclusions for policy-

making.

### **Validation/confrontation of forecast results against the actual developments**

#### Expected tasks:

- confront the forecasts (both supply and demand) against the actual developments on the labour market;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions, recommendations and concrete proposals to be used for further improvement and refinement of successive forecasts.

### **Further development and improvement of the system/model/modules**

#### Expected tasks:

- develop further and improve the system/model based on findings from the previous work (recommendations and concrete proposals);
- produce a report (as a part of the background report – see point 2.6), including a detailed description of further improvement and refinement of methodology for successive forecasts.

## **2010 WORK ASSIGNMENT**

### **Skill demand forecast – update**

#### Expected tasks:

- carry out the update of skill needs/demand forecast based on improved and refined methods/models with breakdown by economic sector, occupation and skill or formal qualification and with different variants/scenarios based on different assumptions;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions for policy-making.

### **Skills supply forecasts – update**

#### Expected tasks:

- carry out the skills supply forecast with breakdown by skill levels and with different variants/scenarios based on different assumptions;
- allocate, if feasible, the skill supply by occupations and industrial sectors while taking into account occupational/sectoral change and mobility;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions for policy-making.

### **Analysis of potential labour market imbalances and further development of methodology for analysing interaction between demand and supply**

#### Expected tasks:

- compare the results of the demand and the supply forecasts (in quantitative and qualitative terms);
- indicate and interpret the nature and scope of possible skill imbalances/mismatches in the medium term in terms of possible shortage and surplus skills/occupations and labour market prospects for qualifications and skill levels;
- based on research findings of previous years develop a special quantitative and/or qualitative methodology on interaction between demand and supply;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, any eventual software and data used, and of the results and conclusions for policy-making.

## 2011 WORK ASSIGNMENT

### **Application of the methodology on interaction between demand and supply and linking the results to the policy development**

#### Expected tasks:

- apply the interaction model/methodology developed in the 2010 work assignment to depict the behavioural relationships and elasticities on the labour market;
- develop a special policy scenario with a broad assessment of the sensitivity of outcomes to key external drivers and mainly different policies which might be implemented at European or/and national levels;
- provide an analysis on interaction between demand and supply and evidence for VET policy, especially on certain issues (e.g. rising skills in elementary occupations and its implications, polarisation of skills, skill-biased technological change) taking into account the results of the previous analysis of labour market imbalances and the policy impact scenario;
- draw conclusions and recommendations for policy-making related to the role of skills and its impact on Europe's strategic development;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, any eventual software and data used, and of the results and conclusions for policy-making.

### **Validation/confrontation of forecast results against the actual developments**

#### Expected tasks:

- confront the forecasts (both supply and demand) against the actual developments on the labour market;
- produce a report (as a part of the background report – see point 2.6), including a detailed description of the methodology, software and data used, and of the results and conclusions, recommendations and concrete proposals to be used for further improvement and refinement of successive forecasts.

### **Further development and improvement of the system/model/modules**

#### Expected tasks:

- develop further and improve the system/model based on findings from previous work (recommendations and concrete proposals);
- produce a report (as a part of the background report – see point 2.6), including a detailed description of further improvement and refinement of methodology for possible successive forecasts.

## **2.6. Reporting**

The following reports will be required within each yearly work assignment:

#### Short inception report

The short inception report is due 1 month after the kick-off meeting and will in particular confirm and/or clarify the rationale of sources to be used, the methodology, the workplan and timetable for the research per task within the annual assignment. The sequence of tasks performance and related reporting will be agreed at the kick-off meeting.

#### Interim report

An interim report will be due 6 months after signature of the respective order form and will present work progress, intermediary findings and indicative conclusions (if possible).

#### Final report

The final report covering all tasks in the assignment must be submitted 12 months after signature of the respective order form and will include:

- executive summary with key findings and conclusions for policy making at European and MS levels (approx. 20 pages);
- a comprehensive summary report presenting the approaches and main results (approx. 100 pages);
- a background report with detailed results (also for each country covered) including detailed description of the methodology, software and data used, and of the results and conclusions for policy-making.

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

Reports shall be submitted to Cedefop in English. They should be submitted in Microsoft Word with all tables, graphs or images included at the appropriate place in the text. The report shall be supplemented by any graphs, tables and images in the appropriate software and by the statistical databases used during research (to allow for Cedefop's check). All required deliverables (including all databases and data sets) should be submitted in electronic form which must correspond to the hardcopy report.

Reports shall be drafted in compliance with the requirements of Cedefop style manual, as attached in Annex H.

Reports should be edited by a researcher in the field being either an English native-speaker or having an equivalent proficiency level to ensure a good readability.

## **2.7. Travels**

The contractor will be requested to attend three scheduled meetings at Cedefop (one day meetings). All costs incurred, including travel and accommodation related to these scheduled meetings as well as any travel expenses that may occur in performing the tasks as described above have to be included in the financial offer (estimated costs/trip per person - see point 5.4 and Annex F).

These meetings should take place every year in Thessaloniki with Cedefop project managers:

- at the start of the work (kick-off meeting)
- upon submission of the interim report
- before submission of the final report (the final results meeting)

The contractor will also be asked to present the work and results achieved so far during the Skillsnet conferences/expert workshops. This will enable the contractor to discuss the methodology and results with European experts and stakeholders in the field (see more in point 2.4). Travel expenses for the Skillsnet conferences/expert workshops and other meetings with Cedefop apart from those mentioned above that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

### **3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER**

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

#### **3.1. Exclusion criteria**

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a definitive court judgement;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a definitive court judgement for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

#### **Means of proof required**

The tenderer shall provide the self-declaration found in Annex C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

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

Cedefop will accept, as satisfactory evidence that the tenderer is not in one of the situations described in point a), b) or e) above, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.

Cedefop will accept, as satisfactory evidence that the tenderer is not in the situation described in point d) above a recent certificate issued by the competent authority of the State concerned. Where no such certificate is issued in the country concerned, it may be replaced by a sworn or,

failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

Cedefop reserves the right to check the situation described in points c) and f).

### **3.2. Selection criteria**

The tenderer must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

#### **Economic & Financial capacity**

Requirement

- The tenderer must be in a stable financial position and have the economic and financial capacity to perform the contract.

Proof of economic and financial capacity may in particular be furnished by one or more of the following documents:

- appropriate statements from the banks or evidence of professional risk indemnity insurance;
- balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

In case tenderers are unable to provide such documents they are required to provide justification for non provision.

#### **Technical and professional capacity**

The service provider must comply with the following criteria:

- Proven experience in the field of research described above and capacity to apply this experience to the skills forecasting at European level
- Ability to cooperate with cross-national networks of researchers in the field of skills forecasting in Europe (such as Cedefop's Skillsnet), to improve the data, methods and results
- Proven experience in international studies and comparative analysis
- Proven experience in selecting, handling and analysing appropriate national and international data sets and in developing suitable methodology
- Linguistic ability incl. capacity to understand, speak and write fluently in English

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

- Description of the professional capacity of the tenderer, especially with regards to the related field of research and linguistic abilities, attested also by the detailed CVs of those responsible for providing the services

- A list of relevant international networks/groupings/consortia/associations the tenderer cooperated with or has been a member of over the past 5 years
- A list of relevant studies carried out by the tenderer over the past 5 years in the relevant field of research, attested also by a list of scientific publications
- A description of the tenderer's study and research capacity and facilities.

Tenderers should pay attention to the provisions made for sub-contracting (see 4.2.) and provide 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 grouping (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 (only for the part of the work that they would undertake). 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.

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.

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.

### **4.2. Subcontracting/Subcontractors**

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the tenderer'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 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, also with regard to 'technical and professional capacity' (only for the part of the work that they would undertake).

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 (see 3.1. and 3.2.) will be evaluated in terms of quality and price.

Quality will be rated by applying Award Criteria 1 to 4 (See 5.1.). Tenders scoring less than 55 (of a maximum of 80) points in total against the award criteria or less than half the points in any of the award criteria will not be considered acceptable and will therefore not have their financial proposal evaluated.

A score will be calculated for each tender that has satisfied the above requirement. A Framework contract shall be awarded to the one tenderer who obtains the highest score according to the following formula:

$$Score = Quality\ points + \left[ 20 * \frac{Lowest\ Total\ Price}{Total\ Price} \right]$$

where

- Quality points are the points awarded to the proposal through the technical evaluation by application of Award Criteria 1 to 4 (see 5.1. and 5.2.);
- ‘Total Price’ (TP) is the total cost of all workdays for all 4 yearly work assignments as indicated in the tenderer’s financial proposal, i.e. the sum of the total number of workdays x Daily price for each of the three staff categories (see 5.3. and 5.4.), and all other costs of a proposal.
- ‘Lowest Total Price’ is the TP as defined above that has been indicated in the lowest financial proposal among all tenderers.

The formula allows for rating proposals on the basis of both quality (technical proposals) and prices and costs (financial proposals).

### 5.1. Technical evaluation

The following technical award criteria will be applied to this tendering procedure to select framework contractors:

- Award criterion 1 – Sound understanding of the purpose of the work and activities to be carried out in the context of the framework contract (10 points);
- Award criterion 2 – Relevance and soundness of the methods proposed (45 points);
- Award criterion 3 – Appropriateness of the expertise proposed and allocation of human resources/experts in relation to the type of activities to be carried out, including external expertise in case of consortium or sub-contracting (15 points);
- Award criterion 4 – Project organisation and mechanisms to guarantee the provision of continuous, adequate and quality services and expertise during the entire duration of the framework contract, including relevant risk assessment (10 points).

## 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 concise discussion of the subject demonstrating in-depth understanding of the concepts, methodologies and research issues; this discussion should contain an analysis of the difficulties likely to be encountered (methodological and others) in carrying out the work and an indication of how the tenderer intends to address these difficulties
- A description of the methods to be followed including a description and preliminary analysis of national and international data sources that could be used during the course of the work
- A description of work organisation and management, i.e. the team to be assigned to the project, the expertise of its members and the tasks distribution among them, including external expertise in case of consortium or sub-contracting
- A description of the workplan for each work assignment, including time-table and expected deliverables, and of the measures for quality assurance and business continuation.

In addition to the above the tenderer must provide the information concerning consortium and subcontracting as requested in points 4.1 and 4.2.

## 5.3. Financial evaluation

The financial evaluation will be made on the basis of the **daily fees x estimated total number of working days** and of the **total other costs**.

The financial proposal with the lowest prices and costs will be given advantage by getting the maximum points (20 points). The number of points attributed to any other financial proposal will be determined by the ratio 'Lowest TP divided by this proposal's TP'. The bigger the gap between the lowest financial proposal and another financial offer, the fewer the points gained by this other financial offer. (See formula in point 5).

## 5.4. Financial proposal

The price offer should be made on the basis of **daily fees** according to the level of seniority of the proposed experts, other fees (administrative and assistant support, etc.) **and other costs** (travels, equipment, data costs, etc.). The tenderers must present a detailed breakdown of the price offered.

For each work assignment, the financial proposal of the tenderers must be provided in the table presented in the attached Annex F.

### Information concerning price

- The prices quoted must be fixed and not revisable (for the first year of the contract).

- Prices must be quoted in euro and include all expenses.
- Under article 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

## **6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER**

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should note the instructions indicated 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 G
- 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 found 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 copy 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 3.2

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

One original signed unbound copy and four bound copies of:

- the financial proposal containing all information requested in point 5.4.

## **ANNEX A**

### **CONTRACT NOTICE**

## **ANNEX B**

### **DRAFT FRAMEWORK 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 judgment 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 entity 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****FINANCIAL OFFER FORM**

		Estimated number of workdays for each work assignment				TOTAL staff costs
	Daily price	2008	2009	2010	2011	
senior researcher		Total number of senior researcher working days =	Total number of senior researcher working days =	Total number of senior researcher working days =	Total number of senior researcher working days =	
Junior researcher		Total number of junior researcher working days =	Total number of junior researcher working days =	Total number of junior researcher working days =	Total number of junior researcher working days =	
Secretary and assistant services		Total number of secretary and assistant services working days =	Total number of secretary and assistant services working days =	Total number of secretary and assistant services working days =	Total number of secretary and assistant services working days =	
		Estimated total other costs for each work assignment				TOTAL other costs
Total other costs						
		Total costs for each work assignment				TOTAL COSTS
TOTAL COSTS						

The estimated total number of working days must be justified by the methodology and work organisation.

Other costs like travels (see point 2.7), equipment, data costs, etc. must be justified in line with the methodology proposed.

## ANNEX G

### 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	<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	<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 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.