

Thessaloniki, 03/07/2008
RS/PRO/2008/732

OPEN INVITATION TO TENDER

AO/ECVL/MILA/Guidance-youth-education-to-work-transitions/013/08

‘Guidance and youth education-to-work transitions’

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 16/09/2008 in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaïdis
PO Box 22 427
GR – 55102 Thessaloniki
Greece**

Important:

*Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu)
or fax (+30 2310 490028)*

- ✓ *that they have submitted an offer in time, and*
- ✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*

- (b) or by courier service to be dispatched not later than 16/09/2008 in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip, to the following address:

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

(c) or delivered by hand not later than 17:00 on 16/09/2008 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;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/ECVL/MILA/Guidance-youth-education-to-work- transitions/013/08</p> <p style="text-align: center;">‘Guidance and youth education-to-work transitions’</p> <p style="text-align: center;">Name of tenderer:</p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
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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 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 30.09.2008, 11 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/ECVL/MILA/Guidance-youth-education-to-work-transitions/013/08

‘Guidance and youth education-to-work transitions’

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 and type of the contract

- a) Title of the contract: “Guidance and youth education-to-work transitions”.
- b) Short description of content: The purpose of this invitation to tender is to launch a study that aims at identifying and examining well-rounded established and/or experimental guidance measures/initiatives to *support school completion and education-to-work transitions of young people at the risk of dropping out of mainstream education and training* (incl. early school leavers’ re-insertion into education and training as well as prevention of early school leaving). The study will cover the European Union (EU) and European Economic Area (EEA) countries.
- c) Type of contract: service contract related to research.

1.2 Place of delivery or performance

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

1.3 Value or quantity of purchase

Maximum budget available for this activity is 90.000 EUR.

1.4 Validity of tenders

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

1.5 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, i.e. Cedefop and shall be valid for a period of 12 months.

1.6 Main terms of financing and payment

Payments will be made within 30 days 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 issued in the context of the political priority attached to lifelong guidance and social inclusion of early school leavers ⁽¹⁾ at European level. Fostering social inclusion and basing Europe's competitiveness on a well-educated, adequately qualified and adaptable workforce are key objectives of the Lisbon strategy. In this context, young people at the risk of social exclusion require individualised information, advisory and guidance services as well as other support measures to navigate in an increasingly complex world, where work, learning and leisure roles have become highly integrated.

The Commission emphasises in its Communication on *Efficiency and equity in European education and training systems* ⁽²⁾ that the Member States are expected to invest more in pre-primary education as an effective way to establish the basis for further learning, reducing school drop-out, increasing equity of outcomes as well as skill levels. Further, the Education Council *Resolution on Lifelong guidance* (2004) stresses "the preventive role of guidance services in encouraging school completion and their contribution to the empowerment of individuals to manage their own learning and careers and to the re-integration of early school leavers in appropriate education and training programmes" ⁽³⁾. Also the results of the OECD study (2004) indicate that alongside reintegration services for young dropouts, there is a need for preventive programmes within schools ⁽⁴⁾.

As part of its support to the development of vocational education and training and evidence-based policy-making in Europe, Cedefop is monitoring the Member States' implementation and improvement of guidance policies, systems and services at all levels of education, training and employment policies. Against this background, this invitation to tender aims at launching a study on identifying and examining well-rounded established and/or experimental guidance measures/initiatives to *support school completion and education-to-work transitions of young people at the risk of dropping out of mainstream education and training* (incl. early school leavers' re-insertion into education and training as well as prevention of early school leaving). The study will cover the European Union (EU) and European Economic Area (EEA) countries.

2.2 Rationale and general purpose of the study

Cedefop's study on *Future skill needs in Europe* (2008) that covers the period up to 2015 concluded that the demand for skills and qualifications is driven upwards in most occupations (including so-called elementary jobs) by the continuing rise of the service sector and sweeping technological and organisational changes ⁽⁵⁾. Therefore, it is evident that young people leaving school with only lower secondary education will be disadvantaged on the future labour market. Young people should be encouraged to stay in education/training after the compulsory education

⁽¹⁾ According to Eurostat definitions, early school-leavers are 18-24 year olds without upper secondary qualifications and youth unemployment refers to young people out of work who actively seek a job whether registered or not. The youth unemployment rate refers to the share of unemployed among the 15-24 year old labour force, the youth unemployment ratio to the 15-24 year old population

(www.eu.int/eurostat)

⁽²⁾ http://ec.europa.eu/education/policies/2010/doc/comm481_en.pdf

⁽³⁾ Resolution of the Council on Strengthening Policies, Systems and Practices in the field of Guidance throughout life in Europe (May 2004)

http://ec.europa.eu/education/policies/2010/doc/resolution2004_en.pdf

⁽⁴⁾ Career guidance and public policy – Bridging the gap (OECD 2004)

<http://www.oecd.org/dataoecd/33/45/34050171.pdf>

⁽⁵⁾ http://www.trainingvillage.gr/etv/Upload/Information_resources/Bookshop/485/4078_en.pdf

and to graduate from upper secondary education. Educational attainment of at least this level is considered the minimum required for active participation in the knowledge-based economy.

There is a clear need for raising education and training levels, especially by halving the number of early school leavers in Europe as one out of six young people between 18-24 years in the 27 EU member states leaves school with no more than lower secondary education and participates in no kind of education or training after this point ⁽⁶⁾. In May 2003, the Education Council adopted five European benchmarks. *The Progress towards Lisbon objectives in education and training* - report (2006) shows that the progress towards these benchmarks is not satisfactory ⁽⁷⁾. In 2006, the share of early school leavers in the EU 25 was of 14.9% (benchmark: 10%) and the upper secondary completion rate (20-24 year olds) of 77.3% (benchmark: 85%). Further to achieving these benchmarks, future-oriented education and training systems with an integral guidance component are to be developed in order to equip all young people in the course of their initial education and training with key competences for adult life and for lifelong learning ⁽⁸⁾.

As early school leaving is often related to socioeconomic factors, lifelong learning policies should be combined with wider social, economic, employment and guidance strategies to promote social inclusion. The Communication on *Promoting young people's full participation in education, employment and society* (2007) is a reaction to demographic ageing in Europe and to the difficulties young people encounter on the labour market. It stresses the need for a cross-cutting approach to youth issues in order to enhance young people's active participation in education, employment and in society ⁽⁹⁾. Improving young people's access to information services (incl. guidance and counselling) and involvement in information activities as well as the quality of information provided to them are measures to promote young adults' active European citizenship ⁽¹⁰⁾.

Moreover, the European Council meeting (2007) identified four key priorities for further implementation of the European Pact for Youth (2005): support for young people in the transitions between education, training and work; the need for individual paths towards integration; the need for coherent local and regional implementation strategies; and greater embodiment of a youth dimension in the overall implementation of the Lisbon Strategy. This Council resolution (2007) ⁽¹¹⁾ also invites the Member States to facilitate the development of local and/or regional strategies that should include all relevant stakeholders, social partners and young people themselves and that should put in place individual support measures to promote qualified, easily accessible guidance and counselling services concerning the transitional stages between education, training and employment. Also the role of families as a means of support to young people in their education and career choices should be further strengthened.

⁽⁶⁾ http://ec.europa.eu/education/policies/2010/doc/progress06/equity_en.pdf

⁽⁷⁾ <http://ec.europa.eu/education/policies/2010/doc/progressreport06.pdf>

⁽⁸⁾ Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning

http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf

⁽⁹⁾ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions on Promoting young people's full participation in education, employment and society

http://eur-lex.europa.eu/LexUriServ/site/en/com/2007/com2007_0498en01.pdf

⁽¹⁰⁾ Resolution of the Council and the Representatives of the Governments of the Member States, meeting within the Council, on implementing the common objectives for participation by and information for young people in view of promoting their active European citizenship

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2006:297:0006:0010:EN:PDF>

⁽¹¹⁾ Resolution of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, of 25 May 2007 on creating equal opportunities for all young people — full participation in society

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2007:314:0001:0003:EN:PDF>

The OECD Job Strategy Pillar D in the *Boosting Jobs and Incomes – Policy Lessons from Readdressing the OECD Jobs Strategy (2006)* ⁽¹²⁾ states, among other things, that in order to facilitate education-to-work transition, it is essential to reduce early exits from education and ensure that young people acquire skills relevant to labour market requirements by broadening vocational programmes, strengthening links between general and vocational education and improving career guidance. However, in many cases policies fail to reach young people at risk due to their distrust of formal institutions. Social inequality and marginalisation of these young people tend to be propagated as their weak networks do not always provide them with access to the right kind of help. Also they are often in need of informal rather than formal support. Thus different forms of bridge-building and mentoring schemes, outreach services, follow-up systems and self-activation measures should be put in place. The structural limitations between formal and non-formal learning should be overcome in order to “open doors” for young people to relevant and meaningful careers (also through apprenticeship training) and to increase their control over their own life.

Finally, the Action Plan on adult learning addresses the persistently high number of early school leavers (nearly 7 million in 2006) and suggests that a second chance supported by guidance must be available to those citizens who enter adult age without having a qualification ⁽¹³⁾. Additionally, special attention is drawn to reducing the number of early school leavers in the joint progress report on the implementation of the Education and Training 2010 work programme to ensure that no one is left behind in the age of globalisation ⁽¹⁴⁾.

In the above policy context and bearing in mind that the European Commission has designated 2010 as the *European Year for Combating Poverty and Social Exclusion*, this Call for tenders aims at commissioning a Europe-wide study on guidance and counselling measures supporting the social inclusion of young people at the risk of dropping out of mainstream education and training. The overall focus of the study will be on identifying and exploring promising practices (i.e. case studies) in education-to-work transitions of young people at risk with the aim to highlight progress made in this area in the EU and EEA Member States, to map out potential areas of further development (policies and practices) and to provide policy- and decision makers as well as guidance practitioners with recommendations/key messages for future action.

2.3 Description of tasks and methodology

2.3.1 Tasks

The study shall incorporate the following three main tasks described in further details below:

- a) Identifying and exploring promising practices (i.e. case studies) in education-to-work transitions of young people at the risk of dropping out of mainstream education and training;
- b) Mapping out potential areas of further development as regards guidance policies and guidance service provision available to young people for their education-to-work transitions; and

⁽¹²⁾ <http://www.oecd.org/dataoecd/47/53/36889821.pdf>

⁽¹³⁾ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions Action Plan on Adult learning - It is always a good time to learn COM(2007) 558 final
http://ec.europa.eu/education/policies/adult/com558_en.pdf

⁽¹⁴⁾ Communication from the Commission to the European Council COM(2007) 803 final - Strategic report on the renewed Lisbon strategy for growth and jobs: launching the new cycle (2008-2010)
http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-annual-report_en.pdf

c) Providing policy- and decision-makers and guidance practitioners with recommendations/key messages for future action.

TASK 1: Identifying and exploring promising practices (i.e. case studies) in education-to-work transitions of young people at the risk of dropping out of mainstream education and training

- The contractor shall identify, analyse and report on **20-25 case studies** (6-9 for each subtheme a, b, and c below) which can be considered as examples of promising practice in guidance service provision at regional, national and European levels. In the sample, the contractor shall include the most recent initiatives established and implemented (time span 2002-2008) with national/regional funding and/or with the support of European programmes, such as European Social Fund (Equal) and Lifelong Learning Programme, but not limit the analysis to these. A balanced geographical representation of both older and newer member states should be ensured (approximately 10 to 12 countries). This 50-60-page study will explore how educational and vocational guidance can most successfully be used
 - a) to integrating early school leavers into mainstream education and training and to offering them a more specialised and tailor-made training provision outside of/parallel to mainstream education. *The main aim is to identify re-integration programmes/initiatives that lead to school completion, facilitate access to the labour market and that have a strong guidance and counselling element embedded.*
 - b) to identifying potential early school leavers and to providing them with prevention programmes that contain systematic, comprehensive and even experientially based interventions to alter negative developmental trajectories and to prevent further complications for the young person at risk. *The main aim is to identify guidance-oriented intervention programmes that involve young people in defining their individual learning targets and occupational interests and in understanding the purpose and intended outcomes of such programmes.*
 - c) to facilitating education-to-work transitions for young people at the risk of dropping out through individualised working life familiarisation programmes. *The main aim is to identify programmes/initiatives that provide guidance support to young people becoming acquainted with the world of work as well as help them analyse their on-the-job learning experience in the context of developing one's professional and personal competences and career management skills.*
- The contractor shall justify the selection of the successful case studies (promising practices) by providing quantitative and qualitative evidence that documents the results achieved. The numerical/statistical quantitative data will be supported by qualitative data such as investigating comments, observations, attitudes and experiences of different groups [e.g. parents, young people, activity/programme/initiative coordinators, school staff (e.g. teachers, guidance counsellors), employers, etc.].
- The contractor shall consider at least the following aspects in the selection of case studies (promising practices) in the context of this call for tenders:
 - o *Strategic guidance partnerships and alliances* at local, regional and national levels based on cross-sectoral and multi-professional network-based cooperation to optimise guidance service provision and delivery to better meet the diverse needs of early school leavers and young people at the risk of dropping out.

- *Top-down and bottom-up approaches in guidance initiatives* supporting young people's (early school leavers, potential dropouts) social inclusion, active citizenship, lifelong learning and smooth labour market entry.
- *Involvement of families* as a means of supporting young people's (early school leavers, potential dropouts) overall learning and education-to-work transition processes, as well as *involvement of young people* in planning and decision-making on issues that concern their future education, career and life aspirations.
- *Mainstreaming potential of the identified promising practices* to other contexts and to other regions/countries as regards the transferability of models and approaches created within the programmes developed/initiatives taken.

TASKS 2 AND 3: Mapping out potential areas of further development in guidance policies and guidance service provision as regards young people's education-to-work transitions AND providing policy- and decision-makers and guidance practitioners with recommendations/key messages for future action.

- The contractor shall undertake a **20-page analysis (research report)** on the contributions of guidance and counselling measures that support the education-to-work transitions of young people at the risk of dropping out of mainstream education and training. The analysis will consider main trends, success factors and challenges as regards policies, strategies, partnerships, service structures and modes of delivery.
- Based on the findings of the desk research and the analysis of promising practices (case studies), the contractor shall **identify and justify 3-5 areas of guidance** (relating to young people's education-to-work transitions) that require further improvement and more attention in the future. This may include, for example, proposing new in-depth research /urgent policy action/special guidance measures, etc.
- The contractor will be expected to highlight **separate key messages for policy- and decision makers and separate for guidance practitioners**. The number of the messages may vary between 5 and 10 in both cases. The messages addressed to policy-makers should include proposals/recommendations for developing lifelong guidance policies and strategies concerning youth education-to-work transitions. The messages targeted at guidance practitioners should cover critical success factors and challenges for effective guidance service delivery in the context of young people at the risk of social exclusion.
- Cedefop is planning to organise a peer learning event on debating and disseminating the results of this study during the latter half of 2009. The contractor will be requested to provide a **proposal for this event**, consisting of well justified working methods, a structure of the sessions and a list of potential speakers with their contact details.

2.3.2 Methodology

- The contractor shall undertake a preliminary desk research to review recent EU policy developments, research reports, comparative studies and evaluations of selected nationally and EU funded projects as regards the theme of this study. The literary review should consider the below mentioned references but should not be limited to them:
 - European Commission DG EAC (2005): **Study on Access to Education and Training, Basic Skills and Early School Leavers** (final report)
<http://ec.europa.eu/education/doc/reports/doc/earlyleave.pdf>

- European Commission DG Research (2004): **EU research on social sciences and humanities – Families and transitions in Europe**
ftp://ftp.cordis.europa.eu/pub/citizens/docs/eur20796_screen_en.pdf
 - Kogan, I. and Müller, W. (Eds) (2003, Universität Mannheim, Mannheimer Zentrum für Europäische Sozialforschung), **School-to-work transitions in Europe – Analyses of the EU LFS 2000 Ad Hoc Module** http://www.mzes.uni-mannheim.de/publications/books/school_to_work_2ed.pdf
 - Müller, W. and Gangl, M. (Eds) (2003, University of Oxford, Oxford University Press), **Transitions from Education to Work in Europe – The integration of youth into EU labour markets** (not available online)
 - OECD (2004). **Career guidance and public policy – Bridging the gap**
<http://www.oecd.org/dataoecd/33/45/34050171.pdf>
 - Quintini, G., Martin, J.P. and Martin, S. (2007 Institute for the Study of Labour): **The changing nature of the school-to-work transition process in OECD countries**, <http://www.oecd.org/dataoecd/5/32/38187773.pdf> (discussion paper 2582)
 - Walther, A. and Pohl, A. (2005, Study commissioned by the European Commission, DG Employment and Social Affairs and coordinated by the Institute for Regional Innovation and Social Research IRIS), **Thematic study on policy measures concerning disadvantaged youth**, (final report) http://ec.europa.eu/employment_social/social_inclusion/docs/youth_study_en.pdf
- The analysis of guidance in supporting the education-to-work transitions of young people at risk (incl. reintegrating early school leavers into education and training, providing preventive measures for potential early school leavers) will also be based on qualitative research methods, in particular for the analysis of examples of promising practice [i.e. through interviews with relevant actors (guidance counsellors in education and employment sector, teachers, young people and their parents, coordinators of guidance initiatives and programmes, etc.) as well as other means chosen by the contractor to collect primary and in-depth information].
 - As to the examples of promising practice, they should be presented and analysed according to a systematic approach. The contractor will be expected to design research tools for collecting, processing and analysing primary and secondary data. A template for the systematic description and analysis of examples of promising practice (case studies) will be produced.

Considering the complexity and multiplicity of the study, the contractor will be advised to rely on a team of experts. The contractor is advised to assemble the team necessary to execute, manage and coordinate the study.

Throughout the completion of the above described tasks, the contractor will consult closely with Cedefop's experts responsible for lifelong guidance.

2.4 Deliverables, reports and timetable (outcome)

An inception report: The report should fine-tune the methodology for identifying and assessing promising practices in the given field. The report should include a draft outline for the description of the case studies (i.e. a detailed template) as well as an outline of the 20-page study. This is due **one month after signature of the contract.**

An interim report, within five months of the date of signature of the contract, which will include:

- a preliminary analysis highlighting intermediary findings, supported by some relevant examples of promising practice;
- a list of potential case studies (i.e. promising practices) with a justification of choices as well as a description of selection criteria applied;
- a minimum of at least 7 completed case studies (with a detailed description and analysis);
- a short description of the methodology, including the final version of the tools for data collection and analysis;
- a list of data sources, including bibliographical data, reference persons and institutions;
- an update of the work plan and timetable for the remaining contractual period;
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study.

A draft final report (study), within 8 months of the date of signature of the contract and a final report within 10 months of the date of signature, following the guidelines provided in these Technical Specifications and including:

- an executive summary in English, presenting the main findings and highlighting key policy considerations for the future, (to be drafted as a self-standing document);
- the 20-page study on the contributions of guidance to supporting school completion and education-to-work transitions of young people at the risk of dropping out of mainstream education and training (incl. early school leavers' re-insertion into education and training as well as prevention of early school leaving) will be illustrated with examples of effective policies and practices;
- a compilation of 20-25 case studies (promising practices) that can serve as prominent examples for guidance service providers and policy-makers in Europe;
- annexes, such as a bibliography, research tools, and a full description of the methodology.

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

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

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

2.5 Meeting and Travel expenses requested by Cedefop

The contractor (one person) will be requested to attend three one-day meetings at Cedefop with the team responsible for lifelong guidance as follows:

- **a kick-off meeting** a few weeks after the signature of the contract to fine-tune the research methodology to be applied, the data sources to be used and the final planning, as well as to discuss the inception report;
- **an interim meeting** to discuss the draft interim report, monitor progress and discuss the interim findings, key messages of the study as well as the peer learning event; and
- **a concluding meeting** to discuss the draft final report and the key policy messages.

2.6 Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop's meetings (point 2.5 above) have to be included in the financial offer, point b) of Table 1 (see also point 5.4).

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in points 2.3 and 2.4, have also to be included in the financial offer, point a) – sub total (2) of Table 1.

Any extra travel, accommodation etc expenses besides those mentioned above, 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 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, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

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

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

Means of proof required

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

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

3.2. Selection criteria

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

Economic & Financial capacity

Requirement

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

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

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

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

Technical and professional capacity

Requirements

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

- qualifications, knowledge and ability of the contractor and the key expert(s) to perform the tasks outlined in sections 2.3 and 2.4 of these technical specifications;
- relevant professional experience in the specific field of the study, as attested by the CVs and related documentation of the experts proposed;
- solid experience of analysis in the field concerned, including the theoretical and empirical aspects, in particular through transversal and comparative analysis across EU countries and the evaluation of projects;
- and linguistic ability to communicate and draft to a high standard in English.

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

Evidence of technical and professional capacity

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

- detailed CV of the Contractor and all members of the study team, with a description of professional experience and research publications related to the study subject, including evidence of experience in comparative studies at European level, and language qualifications;
- list of major contracts/studies performed over the past three years in relevant policy domains with dates and commissioning authorities;
- description of the measures employed to ensure the quality of services.

Tenderers should pay attention to the provisions made for sub-contracting (see 4.2.) and provide an indication of what proportion, if any, of the contract the Contractor may intend to subcontract.

3.3. Legal Position

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

4. Additional information concerning participation to this tender

4.1. Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such groupings (or consortia) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a tender.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria 'technical and professional capacity', the evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

If awarded, the contract will be signed by the company or the person heading the project who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract. Tenders from consortia of firms or group of service providers, contractors or suppliers, must specify the role, qualifications and experience of each member or group.

4.2. Subcontracting/Subcontractors

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. The subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition. If awarded, the contract will be signed by the Tenderer, who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

The tenderer must indicate clearly, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 10% of the work by value.

All subcontractors must provide the required evidence for the exclusion and selection criteria.

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

5. Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender that offers the best-value-for-money (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the total points for quality by the price, thus indicating which tender represents the best value for money.

5.1. Technical evaluation

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

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

- *Award criterion 1 – The level of understanding of the nature and the scope of the assignment, its context and results to be achieved (35 points)*

- Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake, in particular, EU policy framework, developments and challenges relating to developing and implementing guidance measures supporting young people's full participation in education, employment and society (15 points);
- Relevance of the proposal to the objective of the contract, level of understanding of the nature and the scope of the research work, its context and results to be achieved (20 points).
- **Award criterion 2 – Adequacy and relevance of the methodological approach to carry out the work (35 points)**
 - Appropriateness of the methodological approach as well as purposeful application of the methods proposed to conduct the analysis (envisaged steps, research methods and tools, primary and secondary data sources to be used, assessment of probable difficulties) in accordance with the requirements outlined in these Technical Specifications (35 points).
- **Award criterion 3 – Appropriateness of organisation and management of the work (30 points)**
 - Organisation and coordination of the research work, division of tasks, type and degree of involvement of the proposed research team members (15 points);
 - Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (15 points).

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

5.2. Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the technical specifications (in 2.2, 2.3 and 2.4 above).

To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

- a detailed description of the rationale and conceptual approach underlying the study, including:
 - a brief discussion paper demonstrating in-depth understanding of the subject and the purpose of the contract, with detailed research questions and fundamental hypotheses underpinning the study;
 - a detailed description of the envisaged methodology to conduct the study, including
 - a summary of the methodological approach and tools for collecting, processing and analysing the data, especially as regards the identification, selection and analysis of examples of promising practice;

- a list of potential data sources to be used and key reference institutions and experts to be consulted;
 - preliminary assessment of probable challenges/difficulties in carrying out the work and proposed actions.
- a detailed description of the development stages, including:
 - a list of team members together with an explanation of the nature and extent of their participation in the work;
 - a detailed work plan outlining intended organisation and management of the work, including a timetable, with key milestones and deliverables (please refer to 2.3 and 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 (sum of sub totals 1+2+3)** offered in table 1 – Price schedule table (see point 5.4). Any tender containing a financial proposal exceeding the maximum budget mentioned in these tender specifications (see point 1.3) will be rejected.

5.4. Financial proposal

The financial proposal should indicate the total price in order to carry out all the activities indicated in the technical specifications. The tenderers must fill in the following table 1 - Price schedule table and present a detailed breakdown of the price offered.

Table 1: Price schedule table (all fields are mandatory)

	Services	Price
a)	Price to carry out all the activities described in the technical proposal All estimated travel, accommodation etc expenses related to performance of the tasks <i>(indication of total amount)</i>	(I) Number of person-days: (II) Price per person-day: Sub Total (1) = (I) x (II): Sub Total (2) =
b)	Attending 3 meetings of one-day each at Cedefop premises <i>(indication of total amount for all three meetings)</i>	Sub Total (3) =
	Total price: sum of sub totals (1+2+3):	

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- Under articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately see point 5.4.

6. Information on presentation and content of tender

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should fully respect the instructions indicated under points 2 and 3 of this open invitation to tender.

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

6.1. Envelope A - Supporting documents

One original and one copy of:

- the checklist found in Annex 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 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 version and four copies of:

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

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

I hereby declare that neither I nor the company:
(*Company Name*).....

that I am representing are in any of the situations mentioned below:

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

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

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

Signature:

Date:

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal status of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/ftiers_en.htm

PLEASE NOTE:

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

ANNEX F
CEDEFOP STYLE MANUAL

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

You should also ensure that:

<input type="checkbox"/>	your offer is formulated in one of the official languages of the European Union.
<input type="checkbox"/>	both the technical and financial proposals of the offer are signed by you or your 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.