



Thessaloniki, 09/07/2008
RS/PRO/2008/738

OPEN INVITATION TO TENDER

AO/ECVL/RLAR/TT-Changing-competences/014/08

‘Changing roles and competences of VET teachers and trainers’

Dear Sir/Madam,

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

The purpose of this Call for tenders 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 22/09/2008 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.*
- Do not attach your offer to the confirmation email or fax.**

(b) or by courier service to be dispatched not later than 22/09/2008 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 22/09/2008 to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490 064**

In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery. Cedefop is open from 9.00 to 17:00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

3. Tenders must be submitted strictly adhering to the following.

Tenders must be 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/RLAR/TT-Changing-competences/014/08</p> <p style="text-align: center;">‘Changing roles and competences of VET teachers and trainers’</p> <p style="text-align: center;">Name of tenderer:</p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>

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

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft service contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on 06.10.2008, 11.00 hours (local time). Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the 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. Paraskevaidis

Head of Finance and Procurement

Attached: tendering specifications

OPEN INVITATION TO TENDER

AO/ECVL/RLAR/TT-Changing-competences/014/08

“Changing roles and competences of VET teachers and trainers”

Tendering specifications

Table of contents

Introduction to CEDEFOP	6
1 Overview of this tender	7
1.1 Description and type of the contract.....	7
1.2 Place of delivery or performance	7
1.3 Value or quantity of purchase.....	7
1.4 Validity of tenders	7
1.5 Duration of the contract.....	7
1.6 Main terms of financing and payment.....	7
2 Technical specifications	8
2.1 Introduction and Background	8
2.2 General purpose.....	9
2.3 Description of tasks and methodology	10
2.4 Reports, deliverables and timetable (outcome)	11
2.5 Meeting and Travel expenses	12
3 Specific information concerning participation to this tender	13
3.1 Exclusion criteria.....	13
3.2 Selection criteria.....	13
3.3 Legal Position.....	14
4 Additional information concerning participation to this tender	15
4.1 Participation of consortia.....	15
4.2 Subcontracting/Subcontractors.....	15
5 Award of the contract.....	15
5.1 Technical evaluation.....	15
5.2 Technical proposal	16
5.3 Financial evaluation	17
5.4 Financial proposal	17
6 Information on presentation and content of tender.....	18
6.1 Envelope A - Supporting documents.....	18
6.2 Envelope B – Technical proposal	18
6.3 Envelope C – Financial proposal.....	18

ANNEXES:

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

Introduction to CEDEFOP

The European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union. Created in 1975 with a tripartite Governing Board, it provides services for the European Commission, the European Union Member States and the social partners as well as for the associated countries of Norway and Iceland. The candidate countries are also associated with its activities.

As the European Union's reference centre for vocational education and training, Cedefop provides policymakers, researchers and practitioners with information to promote a clearer understanding of developments and so enable them to take informed decisions on future action. Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training.

The main tasks of Cedefop as defined in its founding Regulation are to:

- compile selected documentation and analysis of data;
- contribute to the development and coordination of research;
- exploit and disseminate useful information;
- encourage and support a concerted approach to vocational training development issues;
- provide a forum for a wide and diverse audience.

Cedefop's medium-term priorities for 2006-08 concentrate on the priorities set out in the Maastricht communiqué, which has been agreed by 32 countries, the European Commission and the European social partners:

- a) 'promoting the image and attractiveness of the vocational route for employers and individuals to increase participation in VET;
- b) achieving high levels of quality and innovation in VET systems to benefit all learners and make European VET globally competitive;
- c) linking VET with the knowledge economy's requirements for a highly skilled workforce and especially, because of the strong impact of demographic change, the upgrading and competence development of older workers;
- d) addressing the needs of the low-skilled (about 75 million people aged between 25 and 64 in the EU) and disadvantaged groups so as to achieve social cohesion and increase labour market participation.'

More information about Cedefop can be found on its website: <http://www.cedefop.europa.eu>

1 Overview of this tender

1.1 Description and type of the contract

- a) Title of the contract: **“Changing roles and competences of VET teachers and trainers”**
- b) The aim of this invitation to tender is to commission a study that will identify and assess the changing roles and competences of VET teachers and trainers within new paradigms of learning. The analysis will also consider the impact of the shift of learning paradigms on the training provision (initial and continuous) for VET teachers and trainers in 8-10 EU 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 120.000 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 and Background

2.1.1 Background

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

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

There is a great diversity across Europe in the initial training VET teachers and trainers receive, the qualifications required upon recruitment, and the opportunities available for ongoing professional development ⁽⁸⁾. In many countries of the EU, however, the profession of VET teacher and trainer is not attractive, not sufficiently recognised and the training provided (initial and in-service) does not always fully equip them with the skills and competences required in their changing working environments. Updating the knowledge, skills and competences of VET teachers and trainers will be of crucial importance for implementing the change of paradigm in teaching and training.

As part of its activities to support Member States in the development of their vocational training systems, Cedefop is monitoring developments related to VET teaching and training. Against this background, this Call for tenders aims at commissioning a study on the expanding roles and competences of VET teachers and trainers linked to changes in training/teaching environments and new paradigms of learning, as well as on the professional development pathways for VET

⁽¹⁾ For more information on the education and training elements of Lisbon go to: ec.europa.eu/comm/education/policies/2010/et_2010_en.html and http://ec.europa.eu/education/policies/2010/objectives_en.html

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

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

⁽⁴⁾ SEC (2205) 419 of 22 March 2005

⁽⁵⁾ http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c_079/c_07920060401en00010019.pdf

⁽⁶⁾ Common European principles for teacher competences and qualifications, http://ec.europa.eu/education/policies/2010/testingconf_en.html

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

⁽⁸⁾ Zooming in on 2010, Reassessing vocational education and training, Cedefop, 2007 http://www.trainingvillage.gr/etv/Upload/Information_resources/Bookshop/474/4060_en.pdf

staff. These technical specifications describe the type and extent of the services required and the context in which they are to be delivered.

2.1.2 Introduction

Teaching and training roles are experiencing several paradigmatic changes (i.e. a shift from merely transmitting knowledge to facilitating learning; a change from a monopoly role of teachers and trainers to learner-centred approaches and personalised learning; a move from curriculum-based teaching to learning outcomes...). As increased attention is given at policy level to the professional development of VET teachers and trainers, it is decisive to equip teaching and training staff so they can implement these new learning concepts and practices that are currently at the root of VET reforms. Only if teachers and trainers are up to this challenge VET can respond adequately to the needs of our society and current reforms can be successfully implemented.

This background provides the basis for defining the key questions to be analysed in the framework of this study:

Changing roles and competences of VET teachers and trainers

- How are VET teachers' and trainers' roles expanding within these new paradigms of learning (i.e. learner-centred approaches, learning outcomes...) and changing teaching/training environments? What kinds of new roles are they required to play by the shift of learning paradigms?
- What are the skills, knowledge and competences that VET teachers and trainers need in these new paradigms of learning?

Implication of the shift of learning paradigm on the training of VET teachers and trainers

- What implications does this shift of learning paradigm have for the training of VET teachers and trainers? How should VET teachers and trainers be trained and supported for their new roles?
- How is the current training provision for VET teachers and trainers (initial and continuous) reflecting present challenges (i.e. the shift of learning paradigm and changing teaching and training environments)?
- What can we learn from successful initiatives on how teachers and trainers could be better supported to acquire the skills needed to respond to new challenges and changing roles? What training might be provided to respond to expanding training and teaching roles? What could the content and processes of training be?
- How can the changing nature of teaching and training be monitored so that appropriate changes and adjustments can be made to the training provision for VET teachers and trainers?

2.2 General purpose

The aim of this invitation to tender is to identify and assess the changing roles and competences of VET teachers and trainers within new paradigms of learning and training, based on qualitative analysis and desk research, including previous Cedefop studies ⁽⁹⁾. Special attention shall be given to the competences that VET teachers and trainers need within new learning paradigms, in particular, for implementing pedagogical approaches based on learning outcomes. The analysis

⁽⁹⁾ Please also consult:

http://www.trainingvillage.gr/etv/Information_resources/NationalVet/Thematic/analysis-comp.asp

should also consider how the shift of learning paradigms and changes in working conditions (i.e. managing diversity) are affecting the training provision for VET teachers and trainers in 8-10 EU countries.

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

2.3 Description of tasks and methodology

2.3.1 Tasks

The contractor will be required to perform the following tasks:

a) Analysis of roles and competences within the shift of learning paradigm

- Identify and analyse emerging/new roles of VET teachers and trainers, as well as skills, knowledge and competences related to the shift in learning paradigm (in particular, the learning outcomes approach) through desk research, interviews with key stakeholders, and other qualitative research techniques.
- Describe core skills, competences and knowledge required from VET teachers and trainers to implement new paradigms of learning, through, for example, a competence framework¹⁰.

b) Analysis of the implications of the learning paradigm shift for the training of VET teachers and trainers

- Analyse the implications of new learning paradigms and changing training/teaching environments (e.g. managing diversity) (i) on VET teaching and training, as well as (ii) on the training provision (initial and continuous) for VET teachers and trainers.

2.3.2 Methodology

a) Analysis of emerging roles and competences of VET staff

- Based on literature review and qualitative interviews with key stakeholders in a range of countries to be selected and justified by the contractor, consider how current (initial and continuous) training provision for VET teachers and trainers is reflecting these changes of learning paradigm.
- Identify and analyse shortcomings related to the professional development of VET staff in relation to the shift of learning paradigm, as well as areas which require further policy attention, based on desk research and interviews with key stakeholders.

b) Implications of the shift of learning paradigm for the professional development of VET staff

- Identify and analyse examples of commendable practice (initial and continuous training) and effective policies aiming at equipping VET teachers and trainers to cope with new roles and apply new paradigms of learning across the EU (**in 8-10 countries to be proposed by the tenderer**), which should be embedded in the analysis.

⁽¹⁰⁾ In the framework of this contract, definitions of skills and competences are taken from EQF: http://ec.europa.eu/education/policies/educ/eqf/com_2006_0479_en.pdf

- Identify key policy messages, critical success factors and challenges for the professional development of VET teachers and trainers within new paradigms of learning. The contractor will formulate a series of recommendations for the different stakeholders concerned with the training and qualifications of VET teachers and trainers.
- Identify a number of key experts and correspondents for the collection of primary data, the identification of good examples of practice and policy, as well as the validation of main findings as research progresses.
- Attend three meetings with Cedefop's project manager responsible for the teachers and trainers dossier:
 - a kick-off meeting a few weeks after the signature of the contract to fine-tune final planning and methodology for the research analysis;
 - a meeting to discuss the draft interim report, the interim findings and key messages of the study, and monitor progress;
 - and a meeting to discuss the draft final report and agree the final version of the study;
- as well as present the key findings and messages of the study in events that might be organised by Cedefop in 2009.

Considering the complexity and the diversity of tasks, the contractor is advised to rely on a team of experts to implement the study and to liaise with key stakeholders and experts in a range of countries for the collection of primary data. In the different development stages, the contractor, under the direct supervision of Cedefop's staff, should work closely with TTnet national networks, in particular for the validation of findings and key messages¹¹.

2.4 Reports, deliverables and timetable (outcome)

The Contractor is required to submit:

An inception report, one month and a half after the date of signature of the contract, which refines the methodology proposed in the tender, including a proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data...).

An interim report, within 5 months of the date of signature of the contract, which will comprise:

- a preliminary analysis with intermediary findings and indicative key messages;
- a short description of the methodology, the work carried out and the data sources that have been used;
- the final version of the tools developed for data collection and analysis;
- a brief description of the organisation of the study, an updated work plan and timetable, as well as information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- as well as the proposed structure of the final study.

(¹¹) Additional information on TTnet can be found in the networks' website:
http://www.trainingvillage.gr/etv/Projects_Networks/TTNet/

A draft final report, within **9** 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 highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document;
- a comparative analysis on (i) changing competences of VET teachers and trainers, (ii) the implications of new paradigms of learning on VET teaching and training, as well as (iii) on the training provision (initial/continuous) for VET staff (including a description of skills, knowledge and competences, and (iv) examples of interesting policies and practices) as described in points 2.2 and 2.3 of these Technical Specifications;
- recommendations to EU/national/regional policymakers, training organisations, professional associations on the professional development of VET staff within new paradigms of learning;
- and annexes, such as a bibliography, research tools, a description of the methodology and the work carried out.

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

The contractor will be requested to attend **three one-day** meetings at Cedefop with the team responsible for lifelong guidance:

- a kick-off meeting a few weeks after the signature of the contract to fine-tune final planning and methodology for the research analysis;
- a meeting to discuss the draft interim report, the interim findings and key messages of the study, and monitor progress;
- and a meeting to discuss the draft final report and agree the final version of the study.

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.

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 organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

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

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

Means of proof required

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

Cedefop reserves the right to check the situations 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 2.2 and 2.3 of these technical specifications;
- sound professional experience in the field of VET teachers and trainers' qualifications and professional development at national and EU level;
- proven experience in transversal and comparative analysis in relation to VET teachers and trainers across the EU (in particular previous research experience in relation to emerging roles and competences of teachers and trainers, new paradigms of teaching, and the learning outcomes approach);
- demonstrated experience in qualitative research;
- and linguistic ability to communicate and draft to a high standard in English.

Evidence of technical and professional capacity

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

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

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

- Emerging competences and roles of VET teachers and trainers within changing paradigms of learning (10 points);
 - policies, developments and challenges related to the training and professional development of VET teachers and trainers (10 points);
 - Relevance of the proposal to the objective of the contract, level of understanding of the nature of the work, its context and results to be achieved (20 points).
- ***Award criterion 2 – The adequacy and relevance of the methodological approach to carry out the work (30 points)***
 - Appropriateness of the methodological approach suggested to carry out the comparative analysis (envisaged steps, research methods and tools, data sources to be used and a well-justified selection of countries) in accordance with the requirements outlined in these Technical Specifications (30 points).
- ***Award criterion 3 – Appropriateness of organisation and management of the comparative analysis (30 points)***
 - Organisation of the work, composition of the research team, allocation of tasks, type and degree of involvement of the proposed research team members (15 points);
 - Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable, preliminary assessment of likely difficulties) (15 points).

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

5.2 Technical proposal

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

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

- **Concerning the award criterion 1: a detailed description of the rationale and conceptual approach underlying the completion of the study, including:**
 - a brief discussion paper on the qualifications and professional development of teachers and trainers in the EU, covering
 - competences that VET teachers and trainers should possess in the light of the shift in learning paradigm (e.g. the use of learning outcomes) and changing teaching and training environments;
 - developments and challenges related to qualifications, training and professional development of VET teachers and trainers within new paradigms of learning.
- **Relating to award criterion 2, a detailed description of the envisaged methodology to carry out the study, including**
 - a duly justified proposal for the sample of 8-10 countries;

- a set of research questions and hypotheses;
- and a list of data sources to be used.
- **With regard to the award criterion 3, a detailed description of the development stages, including:**
 - a list of team members together with an explanation of the nature and extent of their participation in the work;
 - a detailed work plan illustrating intended organisation and management of the work, including a timetable, with key milestones and deliverables (please refer to 2.3 and 2.4);
 - preliminary assessment of likely difficulties in carrying out the work and proposed actions.

In addition to the above the tenderer must clearly specify which parts of the work will be sub-contracted (if any) and the identity of all subcontractors undertaking more than 10% of the work by value as requested in point 4.2 (second paragraph).

5.3 Financial evaluation

Only tenders scoring **65 points or more** (of a maximum of 100 points) against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **total price (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) =

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 0 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
<u>Envelope 'A' must contain</u> one original and one copy of:		Yes	No	
- 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	0	<input type="checkbox"/>	<input type="checkbox"/>	
- name and position of the individual(s) entitled to sign contract	0	<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.