

Thessaloniki, 18/05/2009
RS/PRO/2009/412

OPEN INVITATION TO TENDER

AO/ECVL/RLAR/Updating-vocational-skills-teachers/006/09
‘Updating the vocational knowledge and skills of VET teachers:
Bringing teaching close to the labour market’

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 preferably in English, but in any case in one (or in any) of the official languages of the European Union.
2. Tenders may be submitted exclusively in one of the following ways:
 - (a) by post to be dispatched not later than 14/08/2009, 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 e-mail or fax.**

or

(b1) by courier service to be dispatched not later than 14/08/2009, in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip,

or

(b2) delivered by hand not later than 17h00 on 14/08/2009, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

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 / 490 064**

Please note that Cedefop is open from 09h00 to 17h00, 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/Updating-vocational-skills-teachers/006/09</p> <p style="text-align: center;">‘Updating the vocational knowledge and skills of VET teachers: bringing teaching close to the labour market’</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 tendering specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. **The opening of tenders will take place at Cedefop on 28.08.2009, 11h00 (local time).** Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.

7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

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

Requests for additional information/ clarification should be received by 05/08/2009 No such requests will be processed after that date.

- 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. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
9. 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.
10. 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.

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 candidates or tenderers notified.

11. Tenderers are informed that for the purposes of safeguarding the financial interest of the Communities, their personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel and/or to the European Anti-Fraud Office (OLAF).

Data of economic operators which are in one of the situations referred to in Articles 93, 94, 96(1)(b) and 96(2)(a) of the Financial Regulation may be included in a central database and communicated to the designated persons of the Commission, other institutions, agencies, authorities and bodies mentioned in Article 95(1) and (2) of the Financial Regulation. This refers as well to the persons with powers of representation, decision making or control over the said economic operators. Any party entered into the database has the right to be informed of the data concerning it, upon request to Cedefop's Head of Finance and Procurement.

12. Evaluating your tender and your possible subsequent replies to questions, in accordance with the specifications of the invitation to tender will involve the recording and processing of personal data (such as your name, address and CV). Such required personal data will be processed by Cedefop's Finance & Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Community institutions and bodies and on the free movement of such data. You are entitled to obtain access to your personal data on request and to rectify any such data that is inaccurate or incomplete. If you have any queries concerning the processing of your personal data, you may address them to the Head of Finance & Procurement Service. You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.

13. 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/RLAR/Updating-vocational-skills-
teachers/006/09**

**‘Updating the vocational knowledge and skills of VET
teachers: bringing teaching close to the labour
market’**

Tendering Specifications

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Introduction to Cedefop

- 1) Founded in 1975 (1) and based in Greece since 1995, the European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union (EU) supporting European vocational education and training (VET) policy development. Its strategic objective for 2009-11 (2) is to ‘contribute to excellence in VET and strengthen European cooperation in developing, implementing and evaluating European VET policy’.
- 2) This strategic objective is supported by four priorities, namely:
 - (a) informing European VET policies;
 - (b) interpreting European trends in and challenges for skills, competences and learning;
 - (c) assessing VET’s benefits;
 - (d) raising the profile of VET.
- 3) Cedefop supports the European Commission, Member States (as well as the associated countries of Iceland and Norway) and social partners by:
 - (a) using its expertise, gathered through research, analysis and networking, to identify trends and challenges and propose ideas for VET policies;
 - (b) bringing together policy-makers, social partners, researchers and practitioners to share ideas and debate proposals on the best ways to tackle the challenges we face;
 - (c) encouraging European approaches, principles and tools to improve training and achieve common aims;
 - (d) raising awareness and understanding of how vocational education and training is evolving, and how it contributes to lifelong learning and other policies;
 - (e) disseminating information through websites, publications, networks, study visits, conferences and seminars.

Cedefop carries out its role through the tasks set out in its founding regulation. It disseminates information through its website, publications, networks, study visits, conferences and seminars.

- 4) Cedefop’s web portal www.cedefop.europa.eu includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.
- 5) Information about Cedefop’s publications, many of which can be downloaded, can be found at the Cedefop bookshop at http://www.trainingvillage.gr/etv/Information_resources/Bookshop/list.asp Cedefop’s wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

(¹) Council Regulation of 10 February 1975 establishing a European Centre for the Development of Vocational Training (Cedefop) EEC No 337/75, *Official Journal of the European Communities* L39, 13.2.1975 as last amended by Council Regulation EC No. 2051/2004.

(²) Cedefop, *Enhancing European cooperation in vocational education through evidence and expertise: continuity, focus and flexibility: Cedefop’s medium-term priorities 2009-11*.

1 Overview of this tender

1.1 Description and type of the contract

- a) Title of the contract: Updating the vocational knowledge and skills of VET teachers: bringing teaching close to the labour market.
- b) The study will provide an overview in the 27 EU Member States on how countries cope with the obsolescence of VET teachers' knowledge and skills, as well as an in-depth analysis of around 20 practices and policies. The comparative overview will, firstly, consider how countries map the competences of VET teachers, and identify training needs linked to the obsolescence of knowledge and skills. Secondly, the study will examine how the VET sector is monitoring technological innovation and changes related to work organisation in enterprises that are relevant for VET teaching and should be integrated in the initial and continuous training of VET teachers. Finally, the study will review current systems and actions to update the vocational knowledge and skills of teachers, in cooperation with the world of work. Furthermore, the contractor will undertake an in-depth analysis of around 20 policies and practices in the three above mentioned policy domains, based on secondary (desk research) and primary data (quantitative and qualitative research methods). **It is assumed that only a limited number of Member states have established measures and strategies in one or all policy domains.** The study will focus on teachers working in initial vocational education.
- c) Type of contract: Service contract

1.2 Place of delivery or performance

The tasks must be completed at the Contractor's premises.

1.3 Division into lots

This invitation to tender is not divided into lots.

1.4 Variants

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

1.5 Value or quantity of purchase

Maximum budget available for this activity is 150.000 EUR.

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least 6 months following the deadline of submission of tenders, i.e. until 14/02/2010.

1.7 Duration of the contract

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

1.8 Main terms of financing and payment

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

2 Technical specifications

2.1 Introduction

As underlined in recent European policy documents, the training and professional development of VET teachers is an area that requires increased political attention and strategic action ⁽³⁾ ⁽⁴⁾ ⁽⁵⁾. Teachers working in initial vocational education need to possess a renewed set of competences to cope with an enlarged range of challenges and demands. Initial vocational education teachers must keep up to date with developments in enterprises, new technologies and innovation in working practices to bring learning close to the world of work.

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 tender aims at commissioning a study on how EU Member States are coping with the knowledge and skill obsolescence of VET teachers, and how they endeavour to keep teachers' vocational competences⁶ updated. These technical specifications describe the type and extent of the services required and the context in which they are to be delivered.

2.1.1 Identifying training needs and vocational skill gaps of teachers

The VET sector needs to be able to plan for the future, on the basis of reliable projections of its own workforce: their competences, skill gaps, as well as training and professional development needs. Mapping the nature of the VET workforce is essential to gain an understanding of the extent to which the knowledge and skills of teachers working in initial vocational education match current developments in enterprises, innovation and technological change.

There is scarcity of quantitative and qualitative data, in-depth research and analysis in certain Member States on the composition of the teaching workforce, as well as a lack of comparative research at European level on how countries are dealing with the obsolescence of VET teachers' knowledge and skills. Still, several Member states have launched major research projects to map VET teachers' competences, detect shortages of qualified teachers, and identify training gaps requiring further policy action, within their national strategies to upgrade the competences of VET teachers, which may involve some support of the European Social Fund (ESF)⁷. In a number of countries, research on the teaching workforce has thus provided the ground for policy papers and recommendations.

Technological innovation and new working practices in enterprises have an impact on vocational education and training and require steady adjustment of initial and in-service training provision for VET teachers to manage changes. The rapidity of change – in knowledge intensive sectors and occupations as well as in more traditional economic sectors – implies that the vocational education and training sector needs to be increasingly active in identifying technological trends and innovation in enterprises, and in assessing their implications for the teaching provision, and the initial and continuous training of teachers.

⁽³⁾ http://ec.europa.eu/education/policies/2010/doc/council13832_en.pdf

⁽⁴⁾ Conclusions of the Council on improving the quality of teacher education (2007) <http://register.consilium.europa.eu/pdf/en/07/st14/st14413.en07.pdf>

⁽⁵⁾ European Parliament resolution of 23 September 2008 on improving the quality of teacher education” <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P6-TA-2008-0422+0+DOC+XML+V0//EN>

⁽⁶⁾ 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

⁽⁷⁾ Cedefop, Continuity, consolidation and change. Towards a European era of vocational education and training, 2009: 103. http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=528

2.1.2 Coping with the obsolescence of VET teachers' vocational skills

Since many teachers may not have worked in their trade and occupation for some time, their vocational skills and knowledge may also be out of date. VET teachers need to keep up to date with technological trends and new organisation methods, be familiar with the changing work environment in real companies, and have a thorough understanding of current work processes. They should therefore understand and perform the tasks trainees will be asked to perform when they leave school and begin work⁸. In initial vocational education and training, updating teachers' knowledge and skills is thus a major issue of concern. How can we ensure that teachers' vocational skills keep up to date with changes in technologies and working practices so they can bring learning close to the world of work?

Since the labour market and the work place are in continuous change, both in terms of technology and working practices, it is essential that VET teachers continuously update their vocational skills and knowledge. In a number of continuing training programmes, VET teachers work in companies, within so-called on-the-job learning or "returning to enterprises" schemes to update their vocational competences⁹. On-the-job learning seems to be an effective means of getting teachers acquainted with recent developments in technology and working practices and respond better to the needs of working life¹⁰. In some countries, on-the-job learning for teachers in enterprises is now a standard component of continuing training. Twinning arrangements between VET schools and the world of work and other forms of cooperation with enterprises provide early access to innovation at the workplace, keep teaching up to date and help students' transition to working life.

2.1.3 Main research issues

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

- **Monitoring the competences of VET teachers and identifying training needs linked to the obsolescence of knowledge and skills**

How are Member States mapping and monitoring the composition of the VET teaching workforce (i.e. competences and qualifications, vocational competence gaps linked to the obsolescence of knowledge and skills, training and professional development needs...)?

- **Identifying technological change and innovation at the workplace and assessing its impact on VET teaching**

How is the changing nature of the work place (i.e. technological change, work organisation and methods) monitored so that adjustments can be made to training provision for VET teachers?

How are technological innovations and other changes in the workplace identified and transferred into VET teaching? How is their impact and implications on VET teaching and training, and on the training of VET teachers assessed?

- **Addressing the obsolescence of teachers' vocational knowledge and skills through cooperation with enterprises**

How is it ensured that teachers keep up to date with changes in technologies and working practices so they can bring learning close to the world of work?

How can teachers be most successfully and cost effectively supported to maintain their vocational knowledge and skills updated and keep abreast with technological innovation and key changes at the workplace?

⁽⁸⁾ Pia CORT, Auli KÄRKÖNEN, Cedefop Panorama Series, 2004: 10. http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=379

⁽⁹⁾ Cedefop, Continuity, consolidation and change. Towards a European era of vocational education and training, 2009: 104-105.

⁽¹⁰⁾ Pia CORT, Auli KÄRKÖNEN, Cedefop Panorama Series, 2004: 24.

What lessons can be drawn from successful policies and actions to keep the vocational knowledge and skills of VET teachers up-to-date with developments in enterprises (e.g. return to industry programmes, twinning between VET schools and enterprises...)?

2.2 General purpose

Against this background, the study will provide an overview in the 27 Member States on how countries cope with the eventual obsolescence of VET teachers' vocational knowledge and skills, and the mechanisms in place to update their competences, as well as an in-depth analysis of around 20 practices and policies.

Firstly, the EU-wide comparative analysis will consider how countries monitor the VET teaching workforce, map the competences of VET teachers, and identify training needs linked to the obsolescence of knowledge and skills. Secondly, the study will examine how the VET sector is monitoring technological innovation and changes in work organisation that are relevant for VET teaching and should be integrated in the initial and continuous training of VET teachers. Finally, this Europe-wide analysis will review current systems and actions to update the vocational skills of teachers in cooperation with the world of work. The study will focus on teachers working in initial vocational education and training.

In addition, the study will highlight a set of commendable practice, effective strategies and policies in these three interrelated domains: (i) mapping the competences of VET teachers and identifying training needs due to the obsolescence of their knowledge and skills; (2) monitoring technological change and its relevance for VET teaching; and (3) upgrading the vocational knowledge and skills of VET teachers through cooperation with the world of work. These examples of good practice will be the subject of an in-depth analysis (case studies). **It is assumed that only a limited number of Member states have established measures and strategies in one or all policy domains.** The case studies analysis will cover a maximum of 20 policies and practices, based on secondary (desk research) and primary data (quantitative and qualitative research methods).

It is acknowledged that qualified teachers who undertake continuous professional development are a key to improve the attractiveness and quality of VET. The outcomes of this study will bring forward the policy debate on the competences, qualifications, training and professional development of VET teachers and will be presented at events that Cedefop might organise in 2010.

2.3 Description of the tasks and methodology

2.3.1 Tasks

- Europe-wide survey of policies and practices in three interrelated policy domains

The research team will provide an overview on current mechanisms to monitor the composition of the teaching workforce, map VET teachers' competences, training needs and eventual competence gaps (linked to the obsolescence of knowledge and skills). This EU-wide analysis will also consider policies and initiatives that monitor technological innovation and changes in work organisation that have an impact in VET teaching and should be integrated in the initial and continuous training of VET teachers in the 27 Member states. Furthermore, the research will explore action taken to upgrade the vocational competences of VET teachers in cooperation with the world of work, across the EU. The comparative analysis of policies and practices will be based on the examination of secondary (desk research) and primary data (quantitative, as well as qualitative through interviews with key stakeholders) collected by the researchers in the 27 Member States.

Based on national and European studies and projections related to VET teachers, identified in the framework of the study, the contractor will formulate some trends related to the competences and qualifications, vocational skill gaps and training needs of vocational teachers. It should be noted that national data might not be comparable.

- Identification and in-depth analysis of around 20 examples of commendable practice

National pilot initiatives are bringing about a considerable wealth of experience from which important lessons can be drawn. The contractor will identify and analyse in-depth around 20 examples of commendable practice, effective strategies and policies in three domains: mapping the competences of VET teachers and identifying competence gaps; monitoring technological change and its relevance for VET teaching; and upgrading the vocational knowledge and skills of VET teachers through cooperation with the world of work. These examples of policies and practices will be identified in the initial research stage, through a Europe-wide survey based on secondary (through desk research) and primary data (quantitative and qualitative research methods). To the extent possible, the analysis of national practices and policies to update teachers' skills should be accompanied by quantitative evidence documenting the results achieved.

- **Key policy messages and recommendations**

The contractor will identify key policy messages, critical success factors, challenges and trends related to (i) monitoring the competences of the teaching workforce; (ii) analysing relevant technological innovation and changes in work organisation, and (iii) bringing teachers' vocational knowledge and skills up-to-date. The study will suggest possible lines of action for initiatives at local, regional and sector levels in support of VET teachers to maintain their vocational knowledge and skills updated. The contractor will formulate a series of recommendations for the different stakeholders concerned (such as policy makers, VET providers, training institutes, and the social partners).

Throughout the completion of these tasks, the contractor will consult closely with Cedefop's staff in charge of the project on the training and professional development of VET teachers.

2.3.2 Methodology

- **Desk research**

The research team will identify relevant secondary data in the 27 Member states, including quantitative analyses and projections on VET teachers and trainers' competences and qualifications, skill gaps and training needs in the Member states. The contractor will undertake a preliminary desk research in the three interrelated domains of the study: monitoring the competences of the teaching workforce and identifying competence gaps linked to the obsolescence of vocational knowledge and skills; monitoring technological innovation and changes in enterprises that have a strong relevance for vocational education and training; and updating the vocational knowledge and skills of teachers.

- **Qualitative analyses of examples of policies, actions and practices**

The analyses of case studies will be based on literature reviews as well as on qualitative research methods (i.e. through country visits, interviews with stakeholders to be identified by the contractor, and any other means chosen by the contractor to collect primary and in-depth information). The analysis of monitoring systems on the composition of the teaching workforce (e.g. surveys and research that provide an evidence for policy making) will pay special attention to methodological issues and incorporate any statistical data available. It should also be considered how these surveys and projections (e.g. on competences and qualifications, training and professional development needs, skill gaps and VET teachers' shortages) have been exploited in policymaking.

- **Research tools**

The contractor will design research tools for the collection and analysis of primary and secondary data, in particular, a template for the systematic description and analysis of examples of actions and policies at national level.

- **Networking with national experts**

The contractor is advised to assemble the team necessary to execute, manage and coordinate the study. Considering the complexity of the study, the contractor will be advised to rely on a team of experts across different countries to carry out the analysis and validate the findings and key policy messages.

In the different development stages, the contractor, under the direct supervision of Cedefop's staff, should work closely with TTnet national networks, whose contact details will be provided by Cedefop¹¹.

2.4 Reports, deliverables and timetable

An inception report, six weeks after the date of signature of the contract, which refines the methodology proposed in the tender, including a draft proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data, a detailed list of key stakeholders...).

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

- a preliminary analysis, illustrated with some interesting examples of policies and practices, highlighting intermediary findings;
- 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 people and institutions;
- an updated work plan and timetable;
- 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 10 months of the date of signature of the contract and a final report within 11 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 thorough analysis illustrated with examples of effective policies and practices, including quantitative data on the teaching workforce; in particular, the report should include:
 - o a descriptive chapter on the competences and qualifications, training needs and shortages of VET teachers based on quantitative and qualitative data collected in the 27 Member states;
 - o a comparative analysis (27 Member states) in the three policy domains described in these technical specifications, identifying trends and actions, gaps and challenges across the EU, illustrated with examples of practice, which should be embedded in the text;
 - o an in-depth analysis of around 20 case studies exemplifying key initiatives undertaken in the three policy domains in a range of countries;
 - o as well as, recommendations for the different stakeholders concerned with the qualifications and continuing training of VET teachers
- 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).

⁽¹¹⁾ For further information on TTnet (The Training of Trainers Network), please consult: http://www.cedefop.europa.eu/etv/projects_networks/ttnet/

2.5 Scheduled meetings

The contractor will be requested to attend **three one-day** meetings at Cedefop with the team responsible for issues related to VET teachers and trainers:

- 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, described in the inception report;
- a meeting to discuss the draft interim report, monitor progress and discuss the interim findings and preliminary key messages of the study;
- and a meeting to discuss the final outcomes and key policy messages included in the interim 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 in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all consortium members (if any) and all subcontractors specified as per point 4.2, 2nd sub-paragraph (if any) shall provide the self-declaration found in Annex C duly signed and dated.

[For contracts above the threshold (currently 133.000 EUR) of Art. 158.1(a) of the Implementing Rules

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

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

- as satisfactory evidence that the tenderer is not in the situation described in point d) of the declaration, a recent certificate issued by the competent authority of the State concerned. Where no such certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.]

Cedefop reserves the right to check the situations described in points c) and f) of the declaration.

3.2 Selection criteria

The tenderers 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, the published version must be included; otherwise such documents must be certified by the company's chartered accountant);
- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

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

Technical and professional capacity

Requirement

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

- qualifications, knowledge and ability of the contractor and the key expert(s) to perform the tasks outlined in sections 2.2, 2.3 and 2.4 of these technical specifications;
- extensive professional experience in relation to the training and professional development of VET teachers;
- solid experience of policy analysis and research in the field concerned, in particular through transversal and comparative analysis across EU countries;
- sound expertise in quantitative (analysis of statistical data) and qualitative research, in particular in the analysis of case studies;
- 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:

- detailed CV of the tenderer 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 policy analyses, and language competence;
- list of major contracts and studies performed over the past three years in relevant policy domains, including a brief description, dates, and commissioning authorities.

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

In the case of consortia, the tenderer should also provide a written confirmation from each consortium member that they will be ready and willing to participate in the study, and describing their role (see also point 4.1).

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 additionally specify the identity of those subcontractors only undertaking more than 10% of the work by value, provided total sub-contracting is not above 40% of the work by value. If total sub-contracting is above that ceiling, each and every sub-contractor, independently of his contribution to the work by value, must be identified.

All subcontractors identified as per the second sub-paragraph 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

- ***Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (30 points)***
 - Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake **(15 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 **(15 points)**.
- ***Award criterion 2 – The quality and relevance of the methodological approach to carry out the work (40 points)***
 - Appropriateness of the methodological approach suggested for carrying out the analysis (envisaged steps, research methods and tools, data sources to be used) in accordance with the requirements outlined in these Technical Specifications **(40 points)**.
- ***Award criterion 3 – Appropriateness of organisation and management of the work (30 points)***
 - Organisation of the work, the degree and type of involvement of the proposed experts, allocation of tasks **(15 points)**.
 - Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) **(15 points)**.

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

5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the technical specifications. To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

For award criterion 1

- a detailed description of the rationale and conceptual approach underlying the completion of the study, including:
 - a brief discussion paper demonstrating in-depth understanding of the subject and the purpose of the contract, with detailed research issues, questions and hypotheses underlying the study.

For award criterion 2

- a detailed description of the envisaged methodology to carry out the study, including
 - a description of the methodological approach, steps and tools for the collection and analysis of data, in particular the identification, selection and analysis of good examples of policies and practice;
 - a preliminary typology of policies and actions that address the obsolescence of VET teachers' knowledge and competences in the three policy domains covered by the study, illustrated with concrete examples of initiatives in the member states;
 - a list of potential data sources to be used (such as surveys, statistical analysis, qualitative research), and key reference institutions and experts.

For 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);
 - a detailed preliminary assessment of likely difficulties in carrying out the work and proposed actions.

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

5.3 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100 points) against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **total price** (a+b+c) offered in table 1 – Price schedule table (see point 5.4). Any tender containing a financial proposal exceeding the maximum budget mentioned in these tender specifications (see point 1.5) will be rejected.

5.4 Financial proposal

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

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

	Services	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 (indication of total amount)	(I) Number of person-days: (II) Price per person-day: Sub Total (1) = (I) x (II) Sub Total (2) =
b)	Attending 3 meetings at Cedefop premises (indication of total amount for all 3 meetings)	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.
- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).
- Under 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 F
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in point 3.2
- the legal entity form as requested in point 3.3 and found in Annex D
- a statement containing the name and position of the individual(s) entitled to sign the contract
- the financial identification form as found in Annex E

6.2 Envelope B – Technical proposal

One original signed version and three 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 three copies of:

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

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

Declaration of honour with respect to the Exclusion Criteria and absence of conflict of interest

The undersigned.....[*name of the signatory of this form, to be completed*]:

- in his/her own name..... (*if the economic operator is a natural person or in case of own declaration of a director or person with powers of representation, decision making or control over the economic operator*)
or
- representing..... (*if the economic operator is a legal person*)

official name in full (*only for legal person*):.....

official legal form (*only for legal person*):.....

official address in full:

VAT registration number:

declares that the company or organisation that he/she represents / he/she:

a) is not bankrupt or being wound up, is not having its affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning those matters, and is not in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

b) has not been convicted of an offence concerning professional conduct by a judgment which has the force of *res judicata*;

c) has not been guilty of grave professional misconduct proven by any means which the contracting authorities can justify;

d) has fulfilled all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be carried out;

e) has not been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;

f) is not the subject of administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or failing to supply an information, or being declared to be in serious breach of its obligation under contract covered by the budget.

In addition, the undersigned declares on their honour that:

- g) they have no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties or any other relevant connection or shared interest;
- h) they will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;
- i) they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- j) they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to award of the contract;
- k) that the information provided to Cedefop within the context of this invitation to tender is accurate, sincere and complete;
- l) that in case of award of contract of a value greater than 133,000 Euro, they may be requested to provide the evidence that they are not in any of the situations described in points a), b), d) and e) above. Specifically:

For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the Tenderer is a legal person and the national legislation of the country in which the Tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the Tenderer.

For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the Tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

For any of the situations (a), (b), (d) or (e), where any document described in the two paragraphs above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

By signing this form, the undersigned acknowledges that they have been acquainted with the administrative and financial penalties described under Article 134b in conjunction with Article 133a of the Commission Regulation (EC, Euratom) No 2342/2002 of 23/12/2002 laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, which may be applied by analogy by Cedefop if any of the declarations or information provided prove to be false.

Full name

Date

Signature

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)	0, 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 three copies of:				
- the technical proposal	5.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original and three 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.