


CEDEFOP

 European Centre for the Development
of Vocational Training

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 06/09/2011

RS/PRO/YSIRAK/2011/0654

OPEN INVITATION TO TENDER

AO/AREA/ARANI/Sectoral Based Anticipatory System/017/11

'A short-term Sectoral-Based Anticipatory System for labour market trends and skill needs'
Ref.: Contract Notice - 2011/S 170-279087 of 06/09/2011

Dear Sir/Madam,

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

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tender Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted 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 **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch on the postmark or the date of the deposit slip, to the following post address of Cedefop :

**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 any of the above information e-mail or fax.

or

(b1) **by courier service** to be dispatched not later than **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch to the address below or the date of the deposit slip,

or

(b2) **delivered by hand** not later than **the date and time specified in the timetable in point 8 below**, 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 (for points (b1) and (b2)):

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

OPEN INVITATION TO TENDER

AO/AREA/ARANI/Sectoral Based Anticipatory System/017/11

A short-term Sectoral-Based Anticipatory System for labour market trends and skill needs

NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

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. It is mandatory to include in the offer a cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure (see also point 1 of the Tender Specifications).
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 **the date and time specified in the timetable in point 8 below**. 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).

Requests for additional information/clarification should be received by the date and time as specified in the timetable in point 8 below. 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 up to the closing date for receipt of tenders.

After the final date for submission of tenders:

- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the final date for submission of tenders.
- Tenderers should not amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this will lead to rejection of the tender. Any such need identified by the Evaluation Committee will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

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.
- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the tenders have been opened.
- If the supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification if this might alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. The tenderers' replies must serve solely the purpose to provide the Evaluation Committee with a clarification regarding the offer in relation to the technical proposal or concerning obvious clerical errors in the financial offer. Neither the technical content of the tender nor the financial offer may be changed.
- In case the tenderer alters the total financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	11/10/2011	N/A
Last date on which clarifications are issued by Cedefop	as soon as possible	N/A
Deadline for submission of tenders (hand delivered)	20/10/2011	17.00h
Deadline for submission of tenders by post / courier	20/10/2011	N/A
Validity of the tenders	20/04/2012	N/A
Tender opening session	01/11/2011	11.00h

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

In exceptional cases, before the period of validity expires, Cedefop may ask the tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain his tender for a further period of 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the initial period of 6 months irrespective of the date of notification.

10. All costs incurred in preparing and submitting tenders are borne by the tenderers.
11. 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. If such decision is taken, the tenderers will be notified accordingly.
12. 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.
13. 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). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and 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 Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

14. Your personal data (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:
- the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/info_contract/legal_entities_en.htm), or
 - the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).

15. All tenderers will be informed in writing of the results of the tender procedure.

Yours sincerely,

G. Paraskevaidis

Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/AREA/ARANI/Sectoral Based Anticipatory System/017/11

*A short-term Sectoral-Based Anticipatory System for labour market
trends and skill needs*

Tender Specifications

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Introduction to Cedefop: strengthening European cooperation in vocational education and training policy

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) *For 2012-14, Cedefop's strategic objective is to 'contribute to the design and implementation of policies for an attractive VET, facilitating excellence and social inclusion, and to strengthen European cooperation in developing, implementing and analysing European VET policy'. This strategic objective is supported by three priorities, namely:*

- (a) *supporting the modernisation of VET systems;*
- (b) *careers and transitions – continuing VET, adult and work-based learning;*
- (c) *analysing skills and competence needs to inform VET provision.*

These priorities are aligned to Europe's strategy for 2020 and its policy framework.

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.

Informing European training policies

4) Cedefop analyses and reports on the policies Member States are putting in place to provide the skills we need.

5) Cedefop is helping to design, develop and implement joint European approaches. For example, Cedefop is supporting work on tools such as Europass, the European qualifications framework and European credit system for vocational education and training to make it easier to study and work in

(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.

another Member State. Cedefop is also helping develop common European principles for validating non-formal learning, improving vocational guidance, and assuring the quality of training.

6) All of these aim to help people to keep learning throughout their careers, and make use of all their learning, regardless of how it has been acquired.

Interpreting European trends in skills and learning

7) Cedefop is working on a common approach to forecasting demand and supply of skills in Europe. We need to understand more about how the demand for skills will change and how this affects what we need to learn. The better we can anticipate skill needs, the better our policies will be.

8) Cedefop identifies the latest trends and emerging skill needs in the economy and specific sectors. In recent years, Cedefop has been exploring employment effects, skill requirements and policy implications of the transition towards a greener economy. The main aims are to investigate the expected impact of environmental and climate change policies on future skills demand within and across sectors, and to provide insights for effective training and education policies.

9) Cedefop is also examining how people acquire knowledge and skills and how this learning is measured. Valuable and relevant learning takes place in different settings, including work, during leisure time and abroad, as well as at schools, colleges and universities. Cedefop is looking at what this means for institutions, curricula, teaching and training and for assessing knowledge and skills.

Assessing the benefits of training

10) Investment by firms to develop skills can lead to greater productivity, profitability and even stock market performance. Individuals also benefit from training, as it helps workers improve their career and employment prospects, and protects those who are marginalised or otherwise at risk. Yet public and private investment in skills is relatively low in Europe.

11) Demonstrating the positive returns to vocational education and training may encourage both enterprises and individuals to invest in it. Cedefop is also looking at the best ways to measure investment in training to calculate its benefits, and at ways of using statistics and developing new benchmarks and indicators.

Raising the profile of vocational education and training

12) Training is more fragmented than general education and so is not always heard. To raise the profile of training and increase awareness of its role in lifelong learning, Cedefop disseminates clear, reliable, timely, and - where possible - comparable information to its target groups, namely policy-makers, researchers and practitioners, through electronic and printed media.

13) One of the best ways to disseminate information about training is still through personal contact. Through its study visits and conferences, Cedefop brings together people with very different backgrounds and experience to learn from each other and generate new ideas.

Cedefop's information

14) 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.

15) Information about Cedefop's publications, many of which can be downloaded, can be found at the <http://www.cedefop.europa.eu/EN/publications.aspx>. 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.

16) Cedefop is on Facebook at <http://www.facebook.com/Cedefop> and on Twitter at <http://twitter.com/#!/cedefop>.

17) Cedefop hosts and organises conferences and events throughout the year. Cedefop also manages several networks to exchange experience and debate, generate ideas and examine themes. These include Agora conferences, two or three are hosted in Thessaloniki each year. Study visits, short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning in another country. In working to improve VET, Cedefop cooperates with many organisations and has several networks to collect and disseminate information, exchange experience, stimulate debate and generate ideas. Cedefop's major networks include:

- (a) ReferNet (European network of reference and expertise in VET) is Cedefop's primary source of information on VET developments in Member States. ReferNet comprises national consortia consisting of representatives of VET organisations in each Member State led by a national coordinator;
- (b) Skillsnet (network on early identification of skill needs) brings together researchers, policy-makers, social partners and practitioners to exchange information about activities on skill needs analysis and anticipation at European and international levels;

Management, resources and internal controls

16) Cedefop's administration makes an important contribution to achieving Cedefop's operational objectives. It maintains the physical environment and ICT architecture and supports colleagues in procurement, contract and financial procedures. Further, in its dealings with outside organisations and contractors it projects Cedefop's image. Cedefop, in managing its human and financial resources, applies modern and efficient management techniques, in full compliance with the regulations.

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

1 Overview of this tender

In submitting his tender, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale may be, which he hereby waives. Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a tender containing all the required information and documentation may lead to the rejection of the tender. No account can be taken of any reservation expressed in the tender as regards the tender dossier (if necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender); any reservation may result in the immediate rejection of the tender without further evaluation.

1.1 Description and type of the contract

- a) Title of the contract: *A short-term Sectoral-Based Anticipatory System for labour market trends and skill needs*

The ultimate aim of the four-year framework contract is to build up a short-term Sectoral-Based Anticipatory System (SBAS) for labour market trends and skill needs at European level. To this end the framework contract establishes the terms of 4 work assignments aimed at: (1) Development of a suitable SBAS prototype(s) based on a well-defined model design, and preliminary feasibility assessment of the implementation of the System; (2) Implementation and validation of the selected model at an experimental stage, including the definition of institutional and managerial aspects; (3) Further refinement of the System, knowledge transfer and draft guidelines on all the methodological and operational aspects of the System; and (4) Technical and research assistance at the operational phase.

The implementation of each subsequent work assignment is conditional on the acceptance by Cedefop of the approaches proposed by the contractor in previous work assignments. In case the feasibility assessment yields a negative result (1st work assignment), within the scope of the following work assignment the Contracting Authority might ask the Contractor to concentrate solely on developing a “SBAS toolkit” (summarising concepts, methodologies, data and tools) that can be used as a reference model to support transfer of the most promising approach to European Member States.

- b) Type of contract: *Framework Service Contract*

The tasks foreseen under this contract (see point 2.3) will be performed by the Contractor upon signature of separate order forms issued by Cedefop. The content of each order form will be finalised between the Contractor and Cedefop in line with the tender and shall stipulate the specific tasks and deliverables, the timetable, the budget, the human resources/experts to be allocated.

1.2 Place of delivery or performance

The tasks will be completed in the Contractor’s premises

1.3 Division into lots

This tender procedure 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

Cedefop will offer a single framework contract for a series of **4 work assignments** to be concluded over a period of maximum 4 years. For each work assignment, an order form will be issued by Cedefop which will stipulate the tasks to be performed by the contractor, the timetable, the budget, the human resources/experts to be allocated and, if necessary, the reports to be presented. The following estimated budget is foreseen for each work assignment:

- Work assignment 1 - 110.000 €
- Work assignment 2 - 90.000 €
- Work assignment 3 - 50.000 €
- Work assignment 4 - 30.000 €

The estimated total budget for the required services (for all 4 work assignments) described in this call for tenders is of the order of **280.000 €** over a four year period.

The sum of the amounts of the successive Order Forms to be issued after the Framework Contract is signed may not reach the a.m. estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms.

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, shall have an initial duration of two (2) years and will be automatically renewed up to two (2) times, each for an additional period of one (1) year, covering a total period of four (4) years (2+1+1).

1.7 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 Terms of Reference

2.1 BACKGROUND INFORMATION

2.1.1 Current state of affairs and European and international policy context

In the face of challenges arising from technological and organisational developments, globalisation, demographic and climate changes, interest in the early identification of skill needs in Europe has grown remarkably. In the 2008 Commission Communication “New Skills for New Jobs”³, which was followed by two Council Conclusions and an independent Experts Report, the need to support and complement Member States’ efforts to monitor, analyze and anticipate future skills and job requirements in Europe was highlighted.⁴ Particular emphasis is given to strengthening the Union’s capacity to anticipate future skills shortages or surpluses and to address potential mismatches between skills supply and current or expected job vacancies. This is seen as a precondition for the design of efficient employment, education and training policies, as well as for informing individual career choices.

The need to develop an adequate infrastructure of labour market intelligence in Europe has been given additional impetus by the employment crisis of 2008-09. The recent economic recession has also accelerated the pre-existing steady trend of change in the sectoral distribution of EU employment, as the shift in jobs from the primary and basic manufacturing sectors towards services has been hastened. This underlines the continuing importance of identifying sectors and occupations that are likely to face tension due to restructuring of the European economy.

As one of the flagship initiatives of the Europe 2020 strategy of achieving smart, sustainable and inclusive growth⁵, the new ‘Agenda for new skills and jobs’ calls for bridging together all previous efforts and “to further develop the existing forward-looking labour market tools at Member State, regional, sectoral and EU level”.⁶ The strengthening of cooperation between bodies in Member States involved in *skills governance* (anticipation of skill needs and responsiveness of education and training systems) is also advocated as a means of promoting the dissemination of labour market intelligence in employment, education and training policies.

A number of Member States already draw on many years of investment in data, systems and knowledge in order to assess existing and future skill needs in the framework of Observatories, research institutions and specialized departments within Ministries of Labour at national, sectoral and regional level. A variety of quantitative (e.g. multisectoral macroeconomic models) and qualitative approaches (e.g. user groups of experts) are used to identify sectors threatened by industrial change and to inform labour market participants and policies with regard to the future prospects of particular sectors/occupations.

The increasing interest in the identification of skills demand is also evident globally by the growing importance attached to a number of forecasting initiatives undertaken by the US’ Bureau of Labor Statistics (BLS) (*Employment Projections Program*)⁷ and by major international organizations. Projections of employment growth are undertaken in all US states by each State Employment Security Agency and nationally by the BLS. Both long- and short-term outlooks of employment in industries and

³ The Communication from the Commission ‘New Skills for New Jobs’ (COM(2008) 868, 16.12.2008) is available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008DC0868:EN:NOT>

Despite the similarities in names, the ‘New Skills for New Jobs’ initiative should not be confused with the Europe 2020 Strategy ‘An Agenda for new skills and jobs’, the Commission’s contribution to reaching the EU employment rate target by 2020.

⁴ The Report by the Expert Group on New Skills for New Jobs: ‘New Skills for New Jobs: Action Now’ is available at: <http://ec.europa.eu/social/main.jsp?langId=en&catId=88&eventsId=232&furtherEvents=yes>

⁵ The Europe 2020 strategy is available at: <http://ec.europa.eu/eu2020>

⁶ The Communication from the Commission ‘An Agenda for new skills and jobs: A European contribution towards full employment’ (COM(2010) 682, 23.11.2010) is available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010DC0682:EN:NOT>

⁷ Information on the ‘Employment Projections Programme’ of the US Bureau of Labor Statistics is available at: <http://www.bls.gov/emp/>

occupations are published. The long-term projections are for ten years out into the future and are updated every two years. The short-term projections are for two years into the future and are updated annually. A number of other significant international activities on the assessment of current and future KSC include the OECD's 'Programme for the International Assessment of Adult Competencies' (PIACC)⁸ and the ILO's programme on 'Knowledge sharing in early identification of skill needs' (in joint management agreement with the EC's DG EMPL in the framework of the PROGRESS programme)⁹.

2.1.2 Related European projects focusing on the early identification of skill requirements

Against this policy background, **Cedefop's forecast** (project supported by the **Progress programme** – DG EMPL) provides the first comprehensive long term assessment of the skill supply patterns and job requirements in Europe up to 2020.¹⁰ This pan-European tool is regularly and systematically updated in order to monitor closely labour market developments in the EU-27 + group of EFTA countries.¹¹ As part of the "New Skills for New Jobs" initiative, the European Commission (DG EMPL) has also launched the "**Monitoring Labour Market Developments in Europe**" project.¹² The purpose of this initiative is to gather up-to-date information on job vacancies, which will also serve as an early-warning tool for short-term bottlenecks and mismatches in the labour market. The information is made available through two quarterly bulletins: The European **Vacancy Monitor** (EVM) and the European **Job Mobility Bulletin** (EJMB). The EVM provides a comprehensive overview of recent developments and trends in occupational demand and skills requirements in the European job market by synthesizing data on job vacancies and hiring drawn from a wide range of sources: public employment services, temporary work agencies, online services, the Eurostat (Labour Force Survey, job vacancy statistics), national statistical offices and other relevant research. The EJMB, instead, relies on the analysis of vacancies posted on the EURES jobs portal (and its database) by national public employment services. It therefore targets a more specific group of mobile job seekers and EURES advisers.

As part of the **Progress Programme**, the European Commission has also supported the European Restructuring Tool project and has provided transversal analysis on the evolution of skills needs for 19 sectors (e.g. automotive industry, textiles and clothing, chemicals etc.) covering two-thirds of total EU jobs¹³. Moreover, it continues to support the creation of **European Sectoral Skills' Councils**, which will be responsible for the coordination of information sources on sectoral skills and employment¹⁴. In this context, **Cedefop's sectoral studies** also contribute to the identification of new and emerging skill needs in selected innovative sectors of the EU economy, such as those within the green economy and nanotechnology.¹⁵ A similar exercise of engaging in in-depth studies of trends in demand in specific sectors (e.g. biomedical health care, commerce, energy, transport and logistics etc.) is undertaken by the **European Monitoring Centre on Change** (EMCC)¹⁶, under the auspices of the European Foundation for the Improvement of Living and Working Conditions (Eurofound).

⁸ Information on the OECD's 'Programme for the International Assessment of Adult Competencies' is available at: www.oecd.org/piaac

⁹ Information on the ILO's programme on 'Knowledge sharing in early identification of skill needs' is available at: http://www.ilo.org/skills/what/projects/lang--en/WCMS_140837/index.htm

¹⁰ CEDEFOP (2010), *Skills Supply and Demand in Europe: Medium-term Forecast Up to 2020*, Luxembourg: Publication Office of the European Union.:

<http://www.cedefop.europa.eu/EN/publications/15540.aspx>

¹¹ The latest Briefing Note... CEDEFOP (2011), *What next for skills on the European labour market?*... is available at: <http://www.cedefop.europa.eu/EN/publications/17783.aspx>

¹² Information on the 'Monitoring labour market developments in Europe' project of DG EMPL is available at: <http://ec.europa.eu/social/main.jsp?catId=955&langId=en>

¹³ Information on the project of DG EMPL 'Transversal Analysis on the Evolution of Skill Needs in 19 Economic Sectors' is available at: <http://ec.europa.eu/social/main.jsp?langId=en&catId=782&newsId=731&furtherNews=yes>

¹⁴ Information on 'Sector Councils on Employment and Skills at EU level' is available at: <http://ec.europa.eu/social/main.jsp?langId=en&catId=782&newsId=743&furtherNews=yes>

¹⁵ Cedefop-ILO (2010), *Skills for green jobs: European synthesis report* is available at: <http://www.cedefop.europa.eu/EN/publications/16439.aspx>

¹⁶ Information on Eurofound's 'European Monitoring Centre on Change' is available at: <http://www.eurofound.europa.eu/emcc/>

These sectoral studies confirm a general trend in demand for a broader portfolio of skills that transcend traditional occupational skill profiles. To better cope with these changes, the European Commission is engaging in a number of activities that are intended to bridge the gap between the worlds of work and education. These include the development of a multilingual, structured terminology of skills/competences, qualifications and occupations (**ESCO – European terminology on Skills, Competences, Qualifications and Occupations**), which is expected to facilitate the dialogue between labour market needs and the education/training sector. The Commission also announced that it will develop an online portal (**EU Skills Panorama**) that will contain updated information and forecasts on labour market needs at European, national and (where possible) regional level both in the short- (via the EVM) and medium-to long-term period (Cedefop forecasts). The Panorama is expected to provide foresight analysis at sector level and for important innovative areas of the EU economy (e.g. ICT, science, technology, engineering, mathematics).

Recently, Cedefop has also launched the project "Developing and piloting an employer survey on skill needs in Europe". The aim of the project is to develop and pilot a survey instrument to reliably identify future needs of occupations, skills, competences and qualifications in enterprises in Europe, covering the whole economy. Using an innovative task-related approach to skill needs measurement, the employer survey aims to obtain insight into the future (generic and occupation-specific) skill needs of enterprises in a variety of sectors and countries, but also more specifically within and between different occupations.

In performing this assignment, the contractor is required to build on the work of Cedefop on skills anticipation and on the evaluation of skill needs, and on the various initiatives undertaken by the European Commission as described above, bearing in mind that the results of the project are expected to be compatible with, and not duplicative of, Cedefop's skills forecast, and suitable to inform the future Skills Panorama. In all stages of the work, the contractor will be able to consult and utilise the expertise of the Skillsnet network, Cedefop's expert network on the early identification of skill needs, as a means of discussing and validating the potential outcomes of the project.

2.2 OBJECTIVE, PURPOSES & EXPECTED RESULTS

2.2.1 Overall objective

The overall objective pursued by Cedefop is to explore the possibility to complement existing European tools, methods and data with a **short-term Sectoral-Based Anticipatory System (SBAS) for labour market trends and skill needs at European level**.

The system should be able to identify emerging competences and short-term skill needs by occupation and qualification at sectoral level (using as a basis the NACE rev.2 classification at two-digit level though considering different aggregations or groupings), taking into account the distinct characteristics and the differences in the nature of production between sectors. While existing short-term projections for the EU-MS labour markets provided by international institutions and agencies can be exogenously assumed at the aggregated level, an innovative bottom-up approach is expected in order to reconcile the new projections in the target year (by economic sectors, occupations, qualifications and skills/competences) with the existing overall projected employment level.

The system should not only consider historical data but also use possible *leading indicators* of current and expected economic activity (e.g. inventories, economic sentiment indices, investment, online job boards) that take into account the structural adjustment and the responsiveness of sectors to change.

The study outcome should have the potential to implement an anticipatory tool that provides well-structured and comprehensible information to a targeted group of labour market and policy actors (e.g. European and national decision makers for labour market, education and VET policies; European sectoral councils; etc.) taking into account current data infrastructure and expertise in Europe. The contractor

should consider further expanding on the diversity of (quantitative or qualitative) approaches and data available across Member States for similar purposes¹⁷.

2.2.2 Specific objectives

The specific objectives of this contract are as follows:

- **Stocktaking and preliminary feasibility analysis:** review the relevant methodological, technical and policy literature; identify best practices in the current infrastructure of short-term skills anticipation in the Member States and globally; investigate available methodologies and quantitative and/or qualitative sources; propose methods for compiling comparable and informative sources into a coherent picture of sectoral and occupational skill and labour market trends in Europe; analyse potential challenges, opportunities and feasibility of the overall objective of the study.
- **Proposals, development of the system, and validation:** propose specific methodological, technical and procedural solutions to be implemented by Cedefop to set up a sectoral-based, short-term skill anticipation facility at European level; develop experimental prototype(s) of the system; organize a workshop to validate the proposals (with the input of Cedefop's Skillsnet network), and develop one or more experimental version(s) of the system.
- **Implementation and transfer:** build up a short-term Sectoral-Based Anticipatory System (SBAS) for labour market trends and skill needs at European level; draft guidelines on all the methodological, procedural and operational aspects of the System; provide all necessary technical assistance to Cedefop staff responsible for the management of the System to acquire the necessary knowledge and competences.

2.2.3 Results to be achieved by the Contractor

Within a single framework contract a series of **4 work assignments** to be concluded over a period of maximum 4 years. The following results will be expected within each work assignment:

- Working assignment 1 – Feasibility assessment of model design and of SBAS prototype(s)
- Working assignment 2 – Development, testing and implementation of the SBAS System
- Working assignment 3 – Further refinement of the System and knowledge transfer
- Working assignment 4 – Technical and research assistance at the operational phase

2.3 SCOPE OF THE WORK

2.3.1 General Project description

The primary assumption of the project is the acknowledgment of the need for developing short-term and sectoral-based approaches to skills anticipation and VET policies formulation. Although human capital development has an essential role in facilitating structural change and long term economic growth, VET policies can also play a significant role in tackling economic downturns and stabilising the business and economic climate. To this end it is necessary to develop short-term informative tools tailored to the different decision-making levels (local/regional, national or, as in this case, European level) and based on

¹⁷ An indicative but non-exhaustive list of examples includes the AMS Skills Barometer of the Austrian Public Employment Service (<http://www.ams.at/qualifikationsbarometer>), the National Project on Anticipation of Competences and Skills Needs (VOCE) in Finland (http://www.oph.fi/english/sources_of_information/projects/vose), the Irish Expert Group on Future Skill Needs - EGFSN (<http://www.skillsireland.ie/>), the "Professional Compass" of Sweden's Employment Service (<http://www.arbetsformedlingen.se/For-arbetssookande/Yrke-och-framtid.html>), or Italy's information facility on the scenarios of change at the occupational, sectoral and regional level provided by ISFOL (<http://fabbisogni.isfol.it/>).

a bottom-up sectoral approach. Especially in the short-run, sectors may follow different patterns over the aggregate business cycle or in response to structural shocks. Distinct characteristics of sectors (production, position in the value-added chain, integration in world markets) may lead to different reactions to similar economic trends. Moreover, a proper assessment of skills needs also requires a better awareness of the specific characteristics of the internal and external labour markets (methods of recruitment, training policies, collective bargaining, etc.) at the sectoral level.

In this framework, the first step in this contract is to assess the feasibility of setting up a short-term anticipation tool for skills at European level, taking into account methodological and data requirements, the current state of data infrastructure and expertise in Europe, and in particular the existing information on labour market trends and outlooks at the sectoral and occupational level. The following steps will be devoted to build, validate and operate a SBAS system at European level, transfer of relevant knowledge to Cedefop and other possible stakeholders, and to provide assistance at the operational phase.

Assessments at the end of each work assignment will condition the next steps of the contract and related work assignments and order forms (see next section).

2.3.2 Specific activities

The 4 work assignments will be subject to **four different order forms** according to the following timetable.

Work Assignment	Activity	Estimated duration
WA 1	Feasibility assessment of model design and of SBAS prototype(s)	10 months
WA 2	Development, testing and implementation of the SBAS System	12 months
WA 3	Further refinement of the System and knowledge transfer	8 months
WA 4	Technical and research assistance at the operational phase	6 months

The implementation of each subsequent work assignment is conditional on the acceptance and approval by Cedefop of the approaches proposed by the contractor in previous work assignments. In case the feasibility assessment yields a negative result (WA1), within the scope of the following WAs the Contracting Authority might ask the Contractor to propose and develop a “SBAS toolkit” (summarising concepts, methodologies, data and tools) that can be used as a reference model to support transfer of the most promising approach to European Member States.

The specific activities and related tasks within each work assignment, each subject to a **different order form**, are indicated below.

WA1- Feasibility assessment of the model design and of a SBAS prototype(s)

- Search, screen for relevance and make an inventory of existing data and information on labour market needs and skills, considering both quantitative and qualitative sources at MS and EU level, and utilising the available expertise and support of Cedefop’s Skillsnet network.
- Collect and analyse the best and most complete short-term projections for the EU-MS labour markets provided by international institutions, agencies at the European and national level and globally (EC, OECD, IMF, WB, etc.).
- Review the relevant methodological, technical and policy literature in order to identify best practices and transferable approaches suitable to implement a short-term SBAS for skill needs able to project employment levels in the target year by economic sectors, occupations,

qualifications and skills/competences (if possible considering replacement needs); and reconcile these results with existing overall projected levels of employment provided by international institutions at EU-MS level.

- Identify and elaborate on possible methodological and technical solutions for implementing a short-term SBAS for skill needs at EU level - and MS level if possible - considering different approaches, with particular emphasis on making adjustments based on information from labour market signalling approaches (e.g. PES data, job vacancies, key informant interviews, sentiment indices, employer surveys, follow-up studies, etc.)
- Select one or more alternative solutions to be implemented by Cedefop in order to set up a short-term SBAS facility for skill needs, and validate it by organizing an international experts workshop also involving the members of Cedefop's Skillsnet network.
- On the basis of the solution(s) selected in agreement with Cedefop, build up a prototype(s) of the model and validate by conducting ex-post evaluations and sensitivity analysis on the past trends.

WA2 - Development, testing and implementation of the SBAS system

- Develop, test (via appropriate simulations and other quantitative or qualitative methods) and fully implement the short-term SBAS for labour market trends and skill needs.
- Assistance (e.g. drafting, proof reading, text editing, etc.) in the preparation of communication materials (e.g. publication of a synthesis report, briefing notes, etc.).
- Contribution to the organization and participation to meetings and events for the presentation and validation of the final research outcomes.

WA3 – Further refinement of the System and knowledge transfer

- Refine the System on the basis of input by key stakeholders and Cedefop's Skillnet experts regarding the improvement of the methodological framework of the System as developed in work assignment 2.
- Update the final research outcomes predicted by the System, also by considering and implementing possible scenarios of policy relevance identified in agreement with Cedefop.
- Draft guidelines on all the methodological, procedural and operational aspects of the System, including software and data used.
- Technical assistance and training activities aimed at transfer of knowledge, software and operational techniques to Cedefop staff responsible for the management of the System.

WA4 – Technical and research assistance to the operational phase

- Provide technical support to the operation and maintenance of the System.
- Provide recommendations and concrete proposals to refine and improve the System based on lessons learned from the operational phase.

2.3.3 Project management

Responsible Area: Research and Policy Analysis (RPA), Cedefop.

2.3.4 Facilities to be provided by the Contractor

The Contractor shall ensure that experts are adequately supported and equipped. In particular he shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities.

2.4 REPORTS

2.4.1 Reporting requirements

The following reports in *English* will be required within the first work assignment (WA1):

1) Short Inception Report

An Inception Report outlining the methodology, inputs and expected outputs and outcomes of the study, process and timetabling of the research and services provided is due 1 month after the date on which the order form is signed by the last contracting party. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

2) Interim Report

A short Interim Report is due 4 months after the date on which the order form is signed by the last contracting party. Along with interim findings, problems encountered, and a detailed timetable for the completion of further work, the Interim Report should also be the basis for further developing of the research and for the preparation of the Final Report. Cedefop will provide comments on the Interim report. The Contractor should address those comments in the draft Final Report, liaising closely with Cedefop's project manager.

3) Draft Final Report

The Draft Final Report must be delivered within 8 months of the date on which the order form was signed by the last contracting party. The following elements should be included: executive summary; description of methodology; presentation of findings; conclusions and recommendations and, in an annex, a list of the literature reviewed and statistical sources used as well as a full set of data and other relevant information. Cedefop reserves the right to ask for any background data, and evidence of computations and the quantitative models used in the analysis carried out by the contractor. Cedefop will provide comments on the draft final report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

4) Final Reports

Based on the comments mentioned above, a Final Report (based on the revision of the Draft Final Report) and a Synthesis Report (summing up the outcomes of the project and recommendations for future actions), must be delivered within 10 months of the date on which the order form was signed by the last contracting party. Payment of the balance is conditional on Cedefop's acceptance of the revised final deliverables. The reports must be written in English. The Contractor shall ensure that the Synthesis Report as submitted to Cedefop has been subject to professional proof-reading and editing in English (the relevant cost is to be included in point 2c of the Financial Offer table). The Contractor must submit all reports and deliverables in hard copy and on CD-ROM or by e-mail as an MS Word document. Figures, tables, databases and possible scenario analysis simulation model should also be delivered separately as MS Excel or Word documents, as appropriate. Excel charts must contain the data used for the charts (in separate worksheets) so that they can be reproduced. Electronic files must correspond exactly to the hard-copy version. Cedefop reserves the right to ask for any background data, and evidence of computations and the quantitative models used in the analysis carried out by the contractor

The reports required within the following WAs (WP2, WP3 and WP4) will be specifically detailed in each order form. An Inception Report and a Final Report (the latter subject to professional proof-reading and editing in English) will be also required within the following WAs (WP2, WP3 and WP4).

However, the reports required, timing and mode of delivery will be specifically detailed in each order form

2.4.2 Submission & approval of reports

Copies of the reports referred to above must be submitted to the Project manager identified in the contract. The reports must be written in English.

2.4.3 Proof-reading & editing in English of final report(s)

The selected Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (the Table in point 5.3.1, item 2c).

2.5 MEETING AND TRAVEL EXPENSES

For each work assignment the Contractor will be requested to attend (with up to 2 persons) the following one-day meetings at Cedefop premises (in Thessaloniki) with the project managers responsible:

1. a kick-off meeting one month following signature of the order form to fine-tune the final planning of the activities and services described in the inception report;
2. a meeting to discuss the interim report, monitor progress and discuss the interim findings and preliminary key messages of the study;
3. a meeting to present the final outputs/outcomes and discuss possible improvement and key policy messages to be included in the draft final report.

For quality assurance purposes Cedefop may decide to hold an international validation workshop (to discuss and validate the main results from the research) and an international conference for the presentation of the final research outcomes at the conclusion of each work assignments. The Contractor will be asked to participate in those events (with 1 person) to discuss and present the results of the study.

All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described in point 2.3.2, have to be included in the Financial offer (see Table in point 5.3. 1, items 2a and 2b respectively).

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 IV of the Draft Contract in Annex B).

3 Specific information concerning participation to this tender

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 group (consortium) members (if any) and the subcontractor/s (if any), identified as per the two bullet-points in the fourth paragraph of point 4.2 below) **MUST** provide the self-declaration found in Annex C duly signed and dated.

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

In case of recommendation for contract award point l) of Annex C will apply.

3.2 Selection criteria

The selection criteria concern the tenderer's capacity to execute similar contracts.

The tenderers must submit documentary evidence (or statements, where required) of their economic, financial, technical and professional capacity to perform this contract.

Each and all requirements for economic and financial capacity should be fulfilled by the tenderer - alone (in the case of single tenderers) or as a whole (in case the tenderer is a grouping/ consortium). Participation in tendering is open to all legal persons bidding either individually or in a grouping (consortium) of tenderers.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at his disposal. This obligation may be fulfilled by presenting statements from those entities or the consortium agreement.

3.2.1 Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer (of a single company, or of a consortium as a whole, if any) for the last three financial years concerning socio-economic research and policy analysis, should be at least 110,000 €

Proof of economic and financial capacity **must** be furnished by the following documents:

- Signed Statement(s) of the tenderer's turnover (for a single tenderer, or statements for each consortium member, in case of a grouping/ consortium) for the last 3 (three) financial years concerning socio-economic research and policy analysis, which will be verified with the information provided in Annex G.
- Profit and Loss Account or equivalent of the tenderer (covering all fields of activity) for each of the last 3 (three) financial years, which will be verified with the information provided in Annex G.
- for consortium members or subcontractors who are natural persons / freelancers - a tax declaration and tax clearance statement for the last 3 (three) financial years.

If, for some exceptional reason the tenderer is unable to provide one or other of the above documents, he is required to justify the non provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity".

In the case of a consortium (grouping) or subcontracting, each member of the consortium and all subcontractors (in line with points 4.1 and 4.2 below) must provide the required evidence for the economic and financial capacity, but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.

In case of contract award the winning tenderer will be requested to prove the economic and financial capacity by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if this is foreseen by the respective national legislation.

3.2.2 Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract. They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements for Technical and Professional capacity

- At least two (2) contracts performed in the past three (3) years (2008, 2009, and 2010) concerning research and comparative analysis on labour market and/or education and training policies, with a total minimum contract value (turnover, i.e. invoiced financial value) of 100,000 €
- At least one (1) contracts performed in the past three (3) years (2008, 2009, and 2010) concerning labour market forecast and/or scenario analysis, with a total minimum contract value (turnover, i.e. invoiced financial value) of 65,000 €
- The Tenderer's team of experts, who will be proposed to implement the contract, must have the relevant knowledge and experience for its successful implementation. In particular, the proposed experts must comply with the following minimum requirements:
 - Team leader (1 member) - University graduate in social science with at least 8 years experience in research and comparative analysis on labour market and education and training policies, with some experience in labour market forecast and/or scenario analysis;
 - Senior expert (at least 2 members) - University graduate with at least 5 years experience in (i) research and comparative analysis on labour market and/or education and training policies, (ii) and forecast and scenario analysis; some experience in comparative studies at international level is also required;
 - Expert (at least 2 members) - University graduate with at least 1 year experience in research on labour market and/or education and training policies and/or forecast and scenario analysis;
 - Each member of the team of experts must have linguistic ability to communicate and draft to a high standard in English.

Proofs / Evidences of Technical and professional capacity

The following documents or information must be presented by the tenderer to prove his technical and professional capacity to perform the proposed contract:

- Brief presentation of the Tenderer (experience in research and comparative analysis on labour market and education and training policies, structure, resources, trained and certified technical staff, etc);
- List of contracts performed in the past 3 (three) years consistent in terms of scope, size and nature to the above mentioned criteria (see above in this section) , describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (please fill-in Annex G);
- Detailed CVs of each member of the research team proposed to implement the contract; CVs should include lists of publications by proposed team members relevant to the subject of the call and clearly present the linguistic abilities of the experts, in particular in English. CVs must include a brief annex synthesising information aimed at demonstrating the professional capacity of the team members as above requested.

In case of consortium or subcontracting, the consortium or the tenderer with all subcontractors together have to provide evidence of technical and professional capacity as a whole (please see also 4.1 and/or 4.2 below).

3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form. Tenderers are also requested to complete the respective form (tables) in Annex G.

The Legal Entity Form should be completed and signed by the representative(s) of the tenderer (who sign(s) the cover letter as per point 4 of the Invitation to tender) authorised to sign contracts with third parties.

The Legal Entity Form should not be submitted by sub-contractors (if any).

4 Additional information concerning participation to this tender

Participation in tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 106 of the general Financial Regulation the participation is also open to all natural and legal persons in any non-EU country which has an agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

A natural or legal person can take part (as an individual tenderer or as a member of a consortium submitting a tender) in only one tender. In the opposite case all tenders in which that person has participated may be excluded from the evaluation.

4.1 Joint Offers/ Groupings (Consortia)

Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.

Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.

If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.

A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.

Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).

Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.

The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in

place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

The contract will have to be signed by all members of the group (consortium). If the members of the group (consortium) so desire, they may grant authorisation to one of the members of the grouping by signing a power of attorney. The same model as above duly signed and returned together with the offer (Annex I) is valid also for signature of the contract.

Partners in a joint offer assume joint and several liability towards Cedefop for the performance of the contract as a whole.

4.2 Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault.

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. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

The tenderer must clearly indicate:

- the identity of those subcontractors only undertaking between 10% and 40% of the work by value,
- the identity of each and every subcontractor if the total subcontracting is above 40% of the work by value, independently of his contribution to the work by value.

For each subcontractor, identified as per any of the above two bullet-points, the tenderer should submit with the offer:

- the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective subcontractor;
- the required documents to show the economic/financial and technical/professional capacity of the subcontractor as described in points 3.2.1 and 3.2.2;
- the Form in Annex J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract.

N.B. The subcontractor(s) (if any) have to provide the documents to prove their capacity only for the parts of the contract that are relevant to them. The evidence provided will be checked to ensure that the tenderer with the subcontractor(s) altogether fulfil the criteria.

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

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 as represented by the highest Total Score (TS) out of 100.

The Total Score (TS), comprising quality + price score, will be calculated for each tender by applying the formula below:

$$\text{Total Score (TS)} = X * (\text{TQV} / 100) + Y * (\text{Cheapest TFO} / \text{TFO})$$

Whereby:

TQV = Total Quality Value of the tender (as per point 5.2);

TFO = Total Financial Offer of the tender (as per point 5.3);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to 70;

Y is the weighting for price (TFO) and for this tender procedure it is fixed to 30.

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each award (evaluation) criterion and a minimum of 65/100 points (TQV) in the technical evaluation – see point 5.2 below).

5.1 Technical proposal

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference or Technical Specifications as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria.

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference / Technical Specifications in point 2 above providing a practical, detailed description of the goods or services proposed for performance of the contract. It is up to the tenderer to prepare in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full to) all requirements outlined in the Terms of Reference / Technical Specifications. However, the proponents are expected to develop the proposal on the basis of the following scheme:

FRAMEWORK TEMPLATE FOR THE TECHNICAL PROPOSAL

1. Summary of proposal
 - a. overall synthesis (in bullets)
 - b. highlighting of the key/qualifying aspects of the proposal
 - c. additional services offered (compared to the ToR)
2. Rationale of the project
 - a. general description of the methodology, tools and approaches
 - b. comments on the ToR and key issues to the achievements of expected results
 - c. assumptions and risks
3. Methods and tools
 - a. Overall approach
 - b. Activities description
 - i. Inception phase
 - ii. WA1 – Feasibility assessment of model design and of SBAS prototype(s)
 - iii. WA2 – Development, testing and implementation of the SBAS System
 - iv. WA3 – Further refinement of the System and knowledge transfer
 - v. WA4 – Technical and research assistance at the operational phase
 - c. Synoptic table (list of activities, inputs, outputs and outcome)
4. Project management, work organization and team work
5. Quality assurance and risk management
6. Timetable and logical framework

The maximum length of the Technical Proposal to be submitted is 70 pages (all included except table of contents as well as start and end pages). The font should correspond to Times New Roman size 12 pt with single line spacing and standard margins of 2.5 cm.

NB: All the information and means of proof provided commit the contractor throughout the duration of the contract.

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project.

The number of resources (time allocated) in person-days of the internal Cedefop staff that will be needed for this project to be successfully completed should also be shown as best estimate by the tenderer. This information will be used for planning purposes.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

In addition to the above the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 10% of the work by value (or of all subcontractors if total subcontracting is above 40% of the work by value) as requested in point 4.2.

5.2 Technical evaluation

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 tender specifications – indications in italics below refer to the framework template as described in point 5.1 above.

The following Award Criteria for the technical evaluation will be applied to this tender procedure:

Award criteria	Maximum number of points
1) ORGANISATION AND METHODOLOGY	65
1.1. Rationale of the project (understanding of the scope and expected outcomes of the project overall (the four Work Assignments), suitable approach proposed, awareness and description of possible methodological and technical difficulties and constraints, anticipation of possible solutions, completeness of the services offered). <i>(Point 2 of the framework template as described in section 5.1)</i>	30
1.2. Method and tools (congruence and reliability of the methodologies, techniques and tools proposed, innovative character of the specific approaches, understanding of the requirements and expected outputs for the specific tasks). <i>(Point 3 of the framework template as described in section 5.1)</i>	35
2) PROJECT MANAGEMENT AND STAFF ALLOCATION	30
2.1. Project management and team work (function and role of the team leader, management structure, allocation of tasks among experts to ensure experience mix and coverage of complementary subjects based on professional experience and qualifications of the expert team, communication with Cedefop and reporting lines). <i>(Point 4 of the framework template as described in section 5.1)</i>	20
2.2. Quality assurance and risk management (tools and processes to be used, back-up/replacement arrangements, adequate consideration of possible hindrances). <i>(Point 5 of the framework template as described in section 5.1)</i>	5
2.3. Organization of the work process (timetable and logical framework of activities). <i>(Point 6 of the framework template as described in section 5.1)</i>	5
3) ADDITIONAL SERVICES (if any, to be described as such by the tenderer in the technical proposal). <i>(Point 1.c of the framework template as described in section 5.1)</i>	5
OVERALL TOTAL SCORE (Total Quality Value)	100

In order to guarantee a minimum threshold of quality, offers that

- do not reach a minimum of 50% of the possible score for each award (evaluation) criterion and
- obtain an overall total score (Total Quality value) of less than **65** (of a maximum of 100) points against the award (technical) criteria,

will not be considered acceptable and will be eliminated from further evaluation. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.4).

5.3 Financial proposal/ Financial Scenario

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities described in the Terms of Reference. The tenderers must fill in the following Price schedule table and present a detailed breakdown of the price offered.

The Financial offer (Financial Scenario) must be clear and in compliance with the tender specifications and should indicate the total price in order to carry out all the activities described in the Terms of Reference. The tenderers must fill-in four separate Price schedules tables (one for each Work Assignment) plus a total Price schedule table, and present a detailed breakdown of the price offered (please use the Price schedule table template below).

Reimbursement of travel expenses

All costs incurred (travel, accommodation etc) related to Cedefop's meetings as per point 2.5 of the Terms of Reference have to be included in the financial offer, point 2a) of the "Price Schedule Table" below. Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the ToR have also to be included in the financial offer, point 2b) of the Table.

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 IV of the Draft Contract).

Price schedule table TEMPLATE

Instruction:

Please fill-in, prepare and submit:

- a Price Schedule Table for each of the four Work Assignments (i.e please prepare four price schedule tables), using the model given below;
- a Summary (Total) Price Schedule Table (i.e please prepare a "summary" of the four price schedule tables) using again the below given model, and fill in the total quantities/ numbers of units/days/meetings etc and the total amounts for the implementation of all the four Work Assignments total Price

1)	Names / positions of the Experts /Service	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending meetings at Cedefop - see point 2.5, 3 rd paragraph	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks - see point 2.5, 3 rd paragraph	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommod. etc
	2c) Other administrative expenses including professional proof-reading and editing in English of final report(s) – see point 2.4.3	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+ 2b+2c)				
3)	Total Price = Subtotal 1 + Subtotal 2			

The VAT amount must be indicated separately here (this applies to tenderers established in Greece only):
... EUR.

The Financial Offers will be checked for any arithmetical errors in computation and summation. Errors will be corrected by the evaluation committee as follows:

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will be the price taken into account. Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

Information concerning price

- The prices quoted must be fixed and not revisable;
- Prices must be quoted in EUR 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 shall therefore not be included in the calculation of the price quoted.

5.4 Financial evaluation

Only tenders scoring **65** points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** for the implementation of four Work Assignments offered in the Total Price schedule table (see point 5.3 above).

The tenders are awarded points for the Total Price offered by using the following formula:

*Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) * 30*

Where 30 = price weighting (see the complete formula under point 5 above)

6 Information on presentation and content of tender

It is important that tenderers provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should fully respect the instructions indicated under points 2, 3 and 4 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:

- a cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award
- the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 4 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

In the case of tenders submitted by groupings (consortia) or involving contribution by subcontractors, envelope A should also contain all relevant documentation as requested in points 4.1 and 4.2 respectively (with reference to points 3.1, 3.2 and 3.3).

6.2 Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

- the Technical Proposal providing all information requested in point 5.1, including information relevant to subcontracting (if any) as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal (Financial Scenario) containing all information requested in point 5.3.

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

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

(given as a separate *doc file)

ANNEX D

LEGAL ENTITY FORM

Legal Entity Form to be downloaded, depending on the nationality and legal status of the tenderer, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Legal Entity Form to be completed and signed by a representative of the tenderer (name and function) authorised to sign contracts with third parties. It should not be signed by sub-contractors (if any).

ANNEX E

FINANCIAL IDENTIFICATION FORM

To be downloaded, depending on the nationality of the tenderer, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_fr.cfm

and completed and signed by an authorised representative of the tenderer (with indication of name and function), but not by subcontractors.

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PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

(given as a separate *doc file)

ANNEX G

(given as a separate *doc file)

ANNEX H

Cedefop style manual

(given as a separate file in *.pdf format)

ANNEX I

POWER OF ATTORNEY (MODELS 1 and 2)

(given as a separate *.doc file)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(given as a separate *.doc file)

ANNEX K – GLOSSARY OF TERMS

Budget breakdown	The schedule which breaks down the contract value according to the different items or services, stating out fee rate, unit prices and lump sums for each item provided (Services, Supplies, Works).
Consortium	A grouping of eligible natural and legal persons or public entities which submits a tender or an application, under a tender procedure or in response to a Call for Tenders. It may be a permanent, legally-established grouping or a grouping which has been constituted informally for a specific tender procedure. All members of a consortium (i.e., the leader and all other partners) are jointly and severally liable to the Contracting Authority (Cedefop).
Contract	<ul style="list-style-type: none"> • Direct Contract: contract containing all the details necessary to implement it (as opposed to FWC) • Framework Contract (FWC): contract establishing only the general outline of the services or goods to be delivered and requiring an additional step to make the actual purchase • Specific Contract or order form: contract specifying details of a particular task based on the previously signed framework contract • Purchase Order: request for services, supplies or works used generally for procurement of a value below €25 000 as an equivalent to a contract
Contracting Authority	Cedefop
Evaluation committee	A committee made up of an odd number of members (at least three) with the necessary technical and administrative expertise to give an informed opinion on tenders.
Fee-based contract	A contract under which the services are provided on the basis of fixed fee rates for each day worked by experts (SERVICES).
Financial offer	The part of a tender which contains all the financial elements of the tender, including its summary budget and any detailed price breakdown or cash-flow forecast required by the tender dossier.
Framework contract (FWC)	<p>A framework contract is a contract concluded between Cedefop (the Contracting Authority) and an economic operator for the purpose of laying down the essential terms governing a series of specific contracts and/ or Order Forms to be awarded during a given period, in particular as regards the duration, subject, prices, conditions of performance and the quantities envisaged.</p> <p>Cedefop may also conclude multiple framework contracts, which are separate contracts with identical terms awarded to a number of suppliers or service providers.</p>

General conditions	The general contractual provisions setting out the administrative, financial, legal and technical clauses governing the execution of all contracts of a particular type.
Open procedure	Calls for tenders are open where all interested economic operators may submit a tender.
Project	The project in relation to which the services/works/supplies are to be provided under the contract.
Project manager	The person responsible for monitoring the implementation of a project/contract on behalf of Cedefop.
Services	Activities to be performed by the Contractor under the contract such as technical assistance, studies, training and designs (SERVICES).
Special Conditions	The special conditions laid down by Cedefop (the Contracting Authority) as an integral part of the tender specifications (tender dossier), including amendments to the General Conditions, clauses specific to the contract and the terms of reference (for a service contract) or technical specifications (for a supply or works contract).
Successful Tenderer	The tenderer selected at the end of a tender procedure for the award of contract.
Tender	A written or formal offer to supply goods, perform services or execute works for an agreed price and under agreed conditions.
Tender dossier	The set of tender specifications which contains all the documents needed to prepare and submit a tender.
Tender specifications	Document or set of documents giving full details of the conditions, organisation and subject of the procurement procedure (includes technical specifications).
Tender Price	The sum stated by the tenderer in his tender for carrying out the contract.
Tender procedure	The overall process of putting a contract out for tender, starting with the publication of a contract notice and ending with the award of the contract (contract award notice).
Tenderer	A natural or legal person or consortium thereof submitting a tender with a view to concluding a contract.
Terms of Reference (ToR)	The document drawn up by Cedefop (the Contracting Authority) setting out its requirements and/or objectives in respect of the provision of services, specifying, where relevant, the methods and resources to be used and/or results to be achieved (SERVICES).