

Thessaloniki, 15/02/2013  
RES/PRO/CALU/RB(2013)00181

## OPEN INVITATION TO TENDER

### “Collection and review of skill mismatch policies and practices in the EU”

#### AO/RPA/JVLOO-KPOUL/Skill Mismatch Policies/001/13

REFERENCE: *Contract notice – 2013/S033-051019*

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 (and documents included in them) 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. Paraskevaidis  
PO Box 22 427  
GR – 55102 Thessaloniki, Greece**

Important:

*If using a postal service, tenderers must use a registered, reliable one. If no postmark has been stamped or if the postmark is not legible, Cedefop will accept deposit slip issued by the postal service, provided that this clearly indicates the date as filled in by the post office and not by the tenderer.*

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

✓ *that they have submitted an offer in time, and*

✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*

*Tenderers should not attach* *their offer to any of the above informative e-mail or fax.*

or

- b) **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
- c) **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) above):

**European Centre for the Development of Vocational Training (Cedefop),  
Procurement Service, Attention of Mr G. Paraskevaïdis  
123, Europe Str,  
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 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**

**CEDEFOP No: AO/RPA/JVLOO-KPOUL/Skill Mismatch Policies/001/13**

**“Collection and review of skill mismatch policies and practices in the EU”**

Name of tenderer: .....

**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.**
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](mailto: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:

**7.1 Contacts 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 e-mail ([C4T-services@cedefop.europa.eu](mailto:C4T-services@cedefop.europa.eu)) or by fax (fax No +30 2310 490 028).

**Requests for additional information/clarification (if any) from potential tenderers should preferably be written in English and 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.**

- Cedefop 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 tenders.

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/EN/working-with-us/public-procurements/calls-for-tenders.aspx>).

**Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

#### 7.2 Contacts after the final date for submission of tenders and before opening:

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.
- Tenderers are not allowed to 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 may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process 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).

#### 7.3 Contacts after the opening of tenders:

- Tenderers should not contact Cedefop on their own initiative at that stage.
- If clarification on the compliance with the Eligibility and/or Selection Criteria is required or if obvious clerical errors in the tender need to be corrected Cedefop may contact tenderer/s in writing to obtain further clarification or documents on specific points of the tender or to correct obvious clerical errors.
- If the necessary information and/or 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. Tenderers must not modify their tender or add any new elements to it. The reply must therefore make clear reference to the relevant information already present in the file. This will serve solely the purpose to provide the Evaluation Committee with a clarification regarding the technical proposal, provided the terms of the tender are not modified as a result.
- In regards to possible clarifications on obvious clerical errors in the financial offer, tenderers must not add any new prices, but only explain the quotation on the basis of elements and prices already present in the offer. In case a tenderer alters his financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.
- Tenderers should be prepared to reply to such requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

#### 8. Timetable:

	DATE	TIME
Deadline to request any clarification from the Contracting Authority (Cedefop)	21/03/2013	.....
Last date on which clarifications are issued by Cedefop	As soon as possible	.....
Deadline for submission of tenders (hand delivered)	02/04/2013	17.00
Deadline for submission of tenders by post / courier	02/04/2013	.....
Validity of the tenders	02/10/2013	.....
Tender opening session	15/04/2013	11.00

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 should be 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 the 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](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](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](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 this tender procedure.

Yours sincerely,

G. Paraskevaidis

Head of Finance and Procurement

## **OPEN INVITATION TO TENDER**

**AO/RPA/JVLOO-KPOUL/Skill\_Mismatch\_Policies/001/13**

***“COLLECTION AND REVIEW OF SKILL MISMATCH POLICIES AND PRACTICES IN  
THE EU”***

### **TENDERING SPECIFICATIONS**

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## INTRODUCTION TO CEDEFOP - EUROPE'S AGENCY FOR TRAINING POLICY

Source: <http://www.cedefop.europa.eu/EN/about-cedefop.aspx>

To provide people with the skills they need, vocational education and training systems (VET) need to adapt quickly to changing demands. European VET policy's central aim is to promote excellence through VET. To make it both an attractive learning option for the brightest and best young people and adults and an effective way of helping those with low levels of qualification to develop their skills.

Cedefop, (the European Centre for the Development of Vocational Training) founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It provides the European Commission, Member States <sup>(1)</sup> and social partners with insights into trends concerning VET and offers advice on how European VET policy should meet the challenges Europe and its citizens face.

The evidence Cedefop provides comes from its:

- Monitoring of VET policy developments and reforms in Member States;
- Comparative research and analyses, including anticipation of future skill supply and demand;
- Forums for debates among policy-makers, social partners, researchers and practitioners on the best ways to tackle the challenges Europe faces.

### Cedefop's objective and priorities for 2012-14

Cedefop's activities are guided by its strategic objective and medium-term priorities for 2012-14. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET, that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

#### - **Supporting modernisation of VET systems**

Modern VET systems must be relevant to individual and labour market needs. They should take into account learning acquired in different ways (for example through work experience) and at different times, and allow people to move between countries and sectors.

Member States decide national VET policies and Cedefop monitors and reports on the reforms and changes they make to their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with Member States and social partners, has agreed shared objectives. As part of this cooperation, Cedefop has helped develop, and is now working to implement, common European tools and principles which aim to make it both easier to work and study abroad and move between different parts of a national education and training system (for example between general and vocational education).

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<sup>1</sup> Cedefop also works with Iceland and Norway

## - **Careers and transitions – Continuing VET, adult and work-based learning**

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness.

New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

## - **Analysing skills needs to inform VET provision**

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and jobs' requirements.

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States. Cedefop is also finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

## **CEDEFOP'S INFORMATION**

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal <http://www.cedefop.europa.eu>. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop [publications](#) are available for download. Cedefop hosts and organises conferences and events throughout the year. Cedefop also coordinates the study visits programme for the European Commission. [Study visits](#) are 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 addition to its web portal <http://www.cedefop.europa.eu>, Cedefop's work can be followed on Facebook at <http://www.facebook.com/cedefop> and Twitter at <http://www.twitter.com/cedefop>.



## 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); 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: *Collection and review of skill mismatch policies and practices in the EU*
- b) Purpose of the contract: to identify, review and analyse 2 types of policies aimed at mitigating skill mismatch in EU Member States and Croatia: (1) policies targeted at unemployed people aimed at matching their skills with the available jobs and (2) policies and actions focused on dealing with current or anticipated skill shortages. The project entails a thorough academic and policy review of policies and practices in all EU Member States and Croatia and an in-depth analysis of a limited number of initiatives in selected countries that can serve as examples. The evidence gathered in the course of the project will provide information on the effectiveness of skill mismatch policies and their transferability across EU Member States characterised by different institutional and policy contexts. It will complement Cedefop's recent analysis on the drivers and impacts of skill mismatch and groups particularly affected by it. The ultimate goal is to collect new insights on skill mismatch that can be brought to the attention of policy makers and decision makers.
- c) Type of contract: *Service contract (Study contract related to research)*

### 1.2 Place of delivery or performance

The tasks must be completed externally.

### 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

The estimated total budget for the required services described in this call for tenders is of the order of **235.000 EUR, excluding VAT**.

### 1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party (i.e. Cedefop) and shall have duration of fifteen (15) months.

## **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

Cedefop's (2012a) skills forecasts and analysis of skill demand and skill supply provide a core input to debates on future developments in European labour markets <sup>(2)</sup>. Policy-makers increasingly recognise the added value of anticipating skill trends to support evidence-based policy-making, as highlighted in the European Commission's Communication 'New Skills for New Jobs' <sup>(3)</sup> and in one of the flagship initiatives of the Europe 2020 strategy, the 'Agenda for new skills and jobs' <sup>(4)</sup>. By examining developments in economic sectors, occupations and skill levels, the regularly updated Cedefop projections provide a much needed overall assessment of macro-economic labour market trends in the EU and its Member States. The Cedefop projections of anticipated skill imbalances in particular occupations and sectors of EU countries also constitute a key pillar of the EU Skills Panorama <sup>(5)</sup>, a new initiative of the EU Commission that seeks to facilitate the exchange of information on skill needs and skill mismatches in EU Member States.

Parallel and in close connection to its skill demand and skill supply forecast, Cedefop is also analysing skill mismatch. To guide such analysis, five priorities for research have been identified <sup>(6)</sup>. These priorities are: 1) improve measurement of skills and skill mismatch; 2) examine the persistence of skill mismatch and its impacts; 3) improve understanding of skill mismatch processes, its dynamics and the consequences of skill mismatch; 4) focus on skill mismatch for vulnerable groups on the labour market; and 5) improve data availability and use. The work carried out in this context in recent years has aimed to address aspects present in all of the above research priorities <sup>(7)</sup>.

Attention among policy makers for skill mismatch has increased significantly as a result of fast-paced changes in the nature of work and within organisations, related to technological, organisational and demographic developments. The economic crisis has reinforced this trend, as the sectoral reallocation of economic activity and the recession have resulted in ever higher unemployment rates in a number of European countries, particularly among the lower-skilled and the younger segments of the EU population. In the years following the recession, skill mismatch in several EU countries appears to have increased, evident by the greater share of unemployed workers per job vacancy in several EU countries, particularly those severely affected by the economic crisis <sup>(8)</sup>.

The adverse economic situation has called for better public policies that will invest in the reskilling of unemployed or precariously employed workers found in declining sectors of economic activity. Innovative policies that can ensure the speedy reintegration of jobless

<sup>2</sup> See Cedefop (2012a). Europe's skill challenge: Lagging skill demand increases risks of skill mismatch. Cedefop Briefing note. March. Available online at <http://www.cedefop.europa.eu/EN/publications/19651.aspx>.

<sup>3</sup> The Commission Communication '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>.

<sup>4</sup> The Commission Communication '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>

<sup>5</sup> <http://euskillspace.europa.eu/>

<sup>6</sup> See Cedefop (2009). Skill mismatch: Identifying priorities for future research. Cedefop working paper No 3. Thessaloniki. Available online at <http://www.cedefop.europa.eu/EN/publications/5987.aspx>

<sup>7</sup> See Cedefop (2010). The skill matching challenge: Analysing skill mismatch and policy implications, available on-line: <http://www.cedefop.europa.eu/EN/publications/15275.aspx>.

<sup>8</sup> See EU Commission (2012), European Vacancy and Recruitment Report 2012 available at: <http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7267&type=2&furtherPubs=no>

workers into the labour market have also become necessary so as to prevent the atrophy of their skills and the prevention of discouragement and withdrawal from the active labour force. Furthermore, due to the slack demand for labour, an increasing share of higher educated workers has been observed to be recently finding employment in positions that do not fully utilize the high levels of their human capital <sup>(9)</sup>. The extent to which individuals can make best use of their skills in their jobs in order to reduce the negative impacts of over-qualification is also an issue of concern for policymakers.

The EU Communication Towards a job-rich recovery <sup>(10)</sup> has made recommendations to Member States emphasizing the need to boost job creation in Europe and help people in finding jobs that will fully exploit the potential and talent of the European workforce. This may be achieved by investing in emerging and key sectors of the European economy (e.g. green economy, health and social care sector, digital economy), but also via better targeted use of education and employment policies and programmes that encourage investment in skills training and the matching of job seekers with available jobs across Europe.

Assessing of policy initiatives and actions aimed at alleviating skill mismatch and its negative impact strongly depends on the availability of evidence and evaluations. While Cedefop research on skill mismatch has paid some attention to training and development strategies and practices that can help mitigate mismatch at the organisational level, skill mismatch policies by national or regional authorities have not yet been sufficiently considered <sup>(11)</sup>. More work is needed to evaluate what specific actions and policies are best suited to tackle different types of skill mismatch and how the institutional, policy and labour market context impacts on effectiveness. Such analyses can also shed light on the transferability of national policies aimed at tackling skill mismatch to other countries, which is a condition for policy learning in the European context.

## 2.2 General purpose

The purpose of this contract is to conduct a thorough academic and policy review of recent policies and practices that aim to mitigate skill mismatch in all EU Member States and Croatia, to investigate in-depth a range of practices in a limited number of countries, to discuss their effectiveness and to reflect on their transferability to other countries, taking into account different institutional, policy and labour market contexts.

As skill mismatch is a complex and multidimensional phenomenon, policies and actions aimed at addressing it can take a variety of forms. At the macro level, examples are active labour market policies and activation programmes helping to integrate the unemployed or strengthen the employability of workers at risk of losing their job; education and training policies that aim to strengthen the links between the education and training system and the world of work; and labour market measures that target current and anticipated skill bottlenecks. At the sectoral and regional level, policies and practices can focus on provision of new training to meet emerging demands or sectoral skill shortages, skill partnership forums to strengthen skill demand and

<sup>9</sup> See Cedefop (2013), The Skill Mismatch Challenge in Europe, Ch.6 in: EU Commission, Employment and Social Developments in Europe, Luxembourg: Office for Official Publications (available at: <http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7315&type=2&furtherPubs=no>)

<sup>10</sup> <http://ec.europa.eu/social/main.jsp?catId=89&langId=en&newsId=1270&moreDocuments=yes&tableName=news>

<sup>11</sup> Work in previous years has primarily looked at skill mismatch as a phenomenon in different countries. It has investigated the causes of mismatch and analysed how it affects groups particularly affected by skill mismatch: older workers and people with a migrant background. See Cedefop (2010). The right skills for silver workers: An empirical analysis, available on-line: <http://www.cedefop.europa.eu/EN/publications/17066.aspx> and Cedefop (2011), Migrants, minorities, mismatch? Skill mismatch among migrants and ethnic minorities in Europe, available on-line: <http://www.cedefop.europa.eu/EN/publications/18670.aspx>

supply, or industrial clusters coupled with local training initiatives supporting innovation and new sources of growth. Examples of local level initiatives are policies aimed at changing work organisation and job design in unattractive localities and bottom-up skill strategies in cities. Policies targeting employers can aim at encouraging workforce training through favourable tax structures and incentives that encourage investment in skills or stimulate the development or take-up of new human resource management practices supporting social innovation.

The study should consider national and where applicable regional policies and initiatives undertaken by governments and other public organisations. It should not consider human resource management policies focused on tackling mismatch in organisations and initiatives undertaken by the private sector that aim to alleviate mismatch.

To ensure sufficient comparability between countries and lay the framework for a meaningful analysis, the study should limit itself to two broad types of policies and actions addressing skill mismatch. Specifically, the study should consider:

- 1) policies and initiatives targeted at unemployed people aimed at matching their skills with the available jobs
- 2) policies and actions focused on dealing with current or future skill shortages.

These types of policies are at the core of the current policy debate in Europe, as they are key to dealing with the skill mismatch that many countries in Europe are currently facing: high unemployment coinciding with vacancies for which it appears to be particularly difficult to find suitable candidates <sup>(12)</sup>.

The study should not limit itself to policies that target skill mismatch by developing skills in the case where skills demand exceeds skill supply, or where individuals have insufficient skills to perform well in current or future work roles. It should also consider policies and actions that aim to prevent or alleviate skill underutilisation, i.e. situations where people have qualifications or skills that are not or not sufficiently used.

## 2.3 Description of tasks

The study should follow a comparative and qualitative approach. It should be based both on secondary data analyses, taking into account existing research and policy documents as well as on collecting and analysing new data. It consists of three parts. Corresponding to the three parts of the study, the contractor is required to carry out three main tasks. In the following points, the tasks are described in detail.

### 2.3.1 Part 1: country profiles - overviews of recent policy initiatives aimed at tackling skill mismatch

The tasks in the first part of the study should lead to a country profile for each EU Member State and Croatia. Each country profile should give a concise overview of:

- 1) unemployment policies with a focus on skill matching; and
- 2) policies and actions focused on dealing with current or future skill shortages.

For each EU member state and Croatia, a **minimum of one type of policy, initiative or action** in each of the skill mismatch policy categories 1) and 2) above should be

<sup>12</sup> See also: European Commission (2012). Employment and Social Developments in Europe 2012. Available online at <http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7315>

included, but the contractor will be required to consider and include all relevant initiatives undertaken since 2007. Next to new initiatives, changes to existing policies, programmes and actions that have taken place since 2007 should be taken into account as well. Only initiatives that have entered the implementation phase should be included, while those in the design or programming phase should not be considered.

For each relevant policy or initiative, the contractor will be required to draft a concise description. The contractor will be required to combine desk research that considers existing research and policy documents with other ways of gathering evidence to obtain information on several dimensions.

The following list details the minimum information to be included in each description. The contractor may propose additional dimensions provided that he duly justifies them, but the items in the list below are mandatory.

- Type of initiative
- Legal basis
- Rationale
- Description
- Initiator(s)
- Stakeholder(s) involved
- Time span (starting date and duration)
- Scale (number of beneficiaries reached, costs, coverage, national/regional)
- If available: results (impacts, effectiveness)

### 2.3.2 Part 2: in-depth study and analysis of a minimum of 20 selected policy initiatives

The second part of the study concerns an in-depth study and analysis of **2 (two) policy initiatives or actions** aimed at tackling skill mismatch in **a minimum of 10 (ten) countries** chosen out of the 27 EU member States and Croatia. The number of countries a tenderer proposes to include in this part of the study beyond the minimum requirements will be rewarded in the evaluation of the offer (see section 6 'Award of the contract').

The contractor will be required to ensure that for each type of skill mismatch policy (unemployment policies and policies focusing on skill shortages) and for all countries proposed for in –depth study and analysis, **1 (one) policy initiative** is included. The initiatives must be thoroughly investigated in a number of steps. More specifically, for each policy initiative or action selected, the contractor will be required to systematically collect information as follows:

1. **General level**: taking the information collected in part one of the study as a starting point, collecting additional information about the initiative based on a combination of desk-research and other methods. The objective of this step is to obtain a complete general description of the policy initiative or action. At this level, the work should consider published information such as for example legislation, implementation guidelines, progress reports, and evaluation studies.
2. **Policy maker level**: information on the initiative based on one interview with a policy maker who was involved in its development. This should complement information collected at the general level. It should do so by giving more insights into the rationales for the particular policy initiative or action, by reflecting on possible alternatives, and by pointing out difficulties at the legislation phase and real difficulties experienced in practice. It should also highlight the contribution of different stakeholders to the initiative and reflect on the extent to which the initiative can be transferred to other contexts, mainstreamed or up scaled.

3. Intermediate level: Information on the initiative based on one interview with a representative of the organisation responsible for implementing the policy initiative or action. Examples are government organisations, public agencies, or private market entities mandated and publicly funded to implement policies or initiatives. The collection of information at this level should focus on implementation mechanisms and experiences with implementation. It should detail how policy measures and initiatives are put in practice and reflect on aspects, features and characteristics of the initiative that work well and less well in implementation. In addition, special attention should be given to national (and where applicable regional) or sectoral characteristics that impact on the effectiveness of the policy measure. Systematic assessment and/or evaluation of the performance of the policy initiative or action should be included whenever possible.
4. End-beneficiary level: Information collected from those who ultimately benefit from the policy initiative or action based on **minimum 4 (four) interviews**. This may concern for instance a company or an individual benefiting from a particular policy. The information should focus on several dimensions. It should consider what real impacts the policy measure has at the level of the end-beneficiary. Issues that need to be considered are the (expected) benefits of the policy measure, efficiency and possible deadweight losses, and factors that hamper or stimulate effectiveness. The interviews with the end-beneficiaries should be representative in the sense that they reflect the typical experience of many beneficiaries. The number of interviews a tenderer proposes to include at this stage of the study beyond the minimum requirements will be rewarded in the evaluation of the offer (see section 6 'Award of the contract').

### 2.3.3 Part 3: analysis and synthesis of findings

The third part of the study is the analysis and synthesis of the information collected in the first and second parts. It involves a qualitative data analysis that aims to shed light on how policies or actions aimed at tackling skill mismatch work, how they are implemented, and what their results are. The discussion should not only focus on intended results, but also pay attention to unintended (positive or negative) side-effects. Special attention should be given to national, regional, sectoral or other contextual conditions that have an impact on the success/effectiveness of implementation and the role of education and training or labour market institutions. An assessment of the potential transferability of policy initiatives and actions to other contexts (for example by up scaling, mainstreaming or transfer to other countries) and required adaptation of policies to ensure successful transfer should be an integral part of the discussion.

## 2.4 Methods

The research should rely on a thorough analysis of recent national developments in policies aimed at tackling mismatch. Understanding current developments and formulating meaningful conclusions for policy makers requires a grounded approach that blends different research methods to develop country profiles and analyse selected policy initiatives in depth.

### 2.4.1 Desk research and empirical research

The collection of information on policies aimed at tackling mismatch will be based on a review of existing policy documents and research complemented with qualitative research methods where needed (i.e. interviews with policy makers and experts, and any other means proposed by the contractor) to gather the most up-to-date developments and to enable the collection of information not readily available elsewhere.

The in-depth analysis of selected initiatives relies primarily on qualitative research methods (i.e. interviews with policy makers, stakeholders and beneficiaries as described in paragraph 2.3), which enable multi-faceted explorations of complex issues in their real-life settings from different perspectives. The criteria for the selection of countries and initiatives, and the development of research tools and interview protocols that suit the focus of the study are important aspects of the research method.

#### 2.4.2 Networking with national stakeholders

The contractor is advised to assemble the team necessary to execute, manage and coordinate the study. Considering the complexity of the study, the contractor is advised to rely on a team of experts/consortia across different countries to collect the data, carry out the analysis and synthesise the findings.

#### 2.4.3 Collaboration with Cedefop

In the different stages of the study, the contractor will be working in close collaboration with Cedefop's project manager(s) responsible for this project. The research method and tools, and the selection of countries and policy initiatives will be fine-tuned and agreed with Cedefop's project manager(s) responsible for the project. In case the need arises to discuss specific issues and monitor progress between meetings scheduled with Cedefop at its premises, contractors are required to be available for video- or phone conferences with Cedefop's project manager(s).

### 2.5 Deliverables and timetable

The Contractor is required to submit the following deliverables, in accordance with the indicated timetable.

#### 2.5.1 Inception report

An inception report 3 weeks after the date of signature of the contract, which refines the methodology proposed in the tender, including preliminary criteria for the selection of countries and policy initiatives and a proposal of research tools (e.g. draft interview protocols, tools for the collection and analysis of information in all countries) as well as an updated work plan and timetable.

#### 2.5.2 Draft interim report

A draft interim report, within 3 months of the date of signature of the contract, which will comprise:

- Draft country profiles for the following 14 countries: DE, FR, ES, IT, UK, NL, FI, SE, EL, PL, BE, CZ, DK, HR.

#### 2.5.3 Final interim report

A final interim report within 6 months of the date of signature of the contract, which will comprise:

- Draft country profiles for all EU Member States and Croatia;
- A proposal for policy initiatives that have been selected for in-depth analysis on the basis of information gathered in the first part of the study;



- A short description of the research methods, including the final version of the tools for data collection and analysis;
- A complete list of data sources, including bibliographical data, reference people and institutions;
- Information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- A proposed outline of the final report.

#### 2.5.4 Final report

A draft final report, within 12 months of the date of signature of the contract, and a final report within 14 months of the date of signature, following the guidelines provided in these Technical Specifications and including:

- An executive summary, highlighting the main findings and key policy considerations for the future, which can also be distributed as a self-standing document;
- A comparative country analysis (EU member states and Croatia) of policies aimed at tackling skill mismatch, identifying trends and actions, gaps and challenges, effectiveness and transferability potential across the countries under consideration, illustrated with selected examples that should be embedded in the text;
- An in-depth analysis of selected policy analysis in minimum 10 (ten) countries (see point 2.3.2)
- Recommendations and lessons learned for different stakeholders concerned with Employment and Education and Training policy, at national and European level; and Annexes, such as a bibliography, list of abbreviations, research tools, a full description of the methodology and final country profiles for all countries (EU member states and Croatia) in the form of one fiche per country.

#### 2.5.5 Summaries of interviews

For each policy initiative or action, a summary of all interviews held, within 12 months of the date of signature of the contract. The indicative length for each summary is 2000 words.

#### 2.5.6 Complete interview transcripts

For each interview held in the context of this study, a complete interview transcript in the language the interview was conducted, within 12 months of the date of signature of the contract.

Apart from the deliverable specified in point 2.5.6, the contractor shall submit all deliverables in English, in hard copy and in electronic format.

Figures and tables should be delivered separately in Ms Excel or in Ms Word, as appropriate. Ms Excel charts must include the data used to enable Cedefop to reproduce the charts.

The electronic files must correspond fully to the hard-copy version.

Lay-out and format of the text – in particular for citation, bibliography, tables and figures – must comply with Cedefop's style manual (Annex K).

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 Annex H, item 2c).

## 2.6 Meeting and travel expenses

### a) Meetings at Cedefop premises in Thessaloniki

The contractor (**up to 2 persons**) will be requested to attend in total **three one day (3\*1 day) meetings with the responsible project manager(s) at Cedefop's premises in Thessaloniki, Greece:**

1. a kick-off meeting 4 weeks after the contract is signed to fine-tune the research methods to be applied, the sources to be used and the final study planning, described in the inception report;
2. a meeting to discuss the draft interim report and preliminary findings of the study, monitor progress and agree on the outline of the final report;
3. a meeting to discuss and provide comments on the final outcomes and key policy messages included in the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study (final report).

All costs incurred, including travel & accommodation related to Cedefop's meetings in Thessaloniki (described above), have to be included in the financial offer (see point 5.4 and Annex H, item 2a in Price Schedule table).

### b) Other meeting costs

**Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the Technical Specifications have also to be included in the financial offer (see point 5.4 and Annex H, item 2b in Price Schedule table).**

Any extra travel expenses, besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III 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 given in Annex C. Therefore all tenderers, all group (consortium) members (if any) and any subcontractor/s, (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. The exclusion criteria will be assessed in relation to each company individually.

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

In the event 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 their resources at his disposal. This obligation may be fulfilled by presenting signed Statements from those entities. Please note that natural persons (individuals, freelancers) are also considered 'entities' for this purpose.

##### 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.

##### Requirement:

- The average annual turnover of the tenderer for the last **three (3)** financial years **concerning the type of services covered in this call for tenders** should be at least **200,000 €**.

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

- Signed statement (please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover concerning the type of services covered in this call for tenders during each of the last 3 (three) financial years.

In the case of a consortium (grouping) or subcontracting each member of the consortium and all sub-contractors must provide the required statement for the economic and financial capacity (Questionnaire 2 of Annex G), **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 the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors.

If, for some exceptional reason the tenderer is unable to provide one or more 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.

### 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:

- The tenderer must have a **minimum of three (3) years' experience in the field of Education and Training and/or Labour Market policy and a proven capacity to access data at national and European levels;**
- The tenderer's proposed team of experts must have the profiles, knowledge and experience relevant to the subject of the study for the successful implementation of the contract. In particular, the following requirements are mandatory:
  - **For the proposed Team Leader:**
    - **Minimum Five (5) years** individual professional experience in international research project management;
    - **Minimum Five (5) years** individual professional research experience in total, in one or more of the following fields:
      - Comparative research on policies aimed at tackling skill mismatch;
      - Comparative education and training policy analysis;
      - Comparative labour market and/or employment policy analysis;
    - Linguistic ability to communicate and draft to a **high standard in English** (Level C1<sup>(13)</sup>) as determined in "Language levels of the Common European Framework of Reference (CEF)".
  - **For each of the proposed Senior researchers:**
    - **Minimum Five (5) years** individual professional research experience in total, in one or more of the following fields:
      - Comparative research on policies aimed at tackling skill mismatch;
      - Comparative education and training policy analysis;

<sup>13</sup> <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

- Comparative labour market and/or employment policy analysis;
  - Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).
- **For each of the proposed Junior researchers:**
    - **Minimum Three (3) years** individual experience in total, in one or more of the following fields:
      - Comparative research on policies aimed at tackling skill mismatch;
      - Comparative education and training policy analysis;
      - Comparative labour market and/or employment policy analysis;

Linguistic ability to communicate and draft in English: for those to be involved in drafting documents to at least level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”, for the other experts to at least level B1.

### 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:

- **A brief company profile** with short presentation of the Tenderer (experience in the field of Education and Training and/or Labour Market policy, capacity to access data at national and European levels);
- A list of **at least 3 contracts** performed in the past three (3) years <sup>(14)</sup> similar to the scope, size and nature of this call for tenders, (i.e. covering subjects of research and analysis on education and training and/or labour market policies), 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, Questionnaire 3);
- **The detailed CVs of the experts** who will be proposed to implement the contract (the Team Leader/ Senior and Junior Researchers, i.e. of the persons whose involvement will be crucial for performing the contract), including reference to linguistic abilities.

In case of consortium or subcontracting, the consortium or the tenderer with all subcontractors together must provide evidence of technical and professional capacity as a whole (see also 5.1 and/or 5.2 below).

### 3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 5.1) 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 5.2). 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 (Questionnaire 1) in Annex G.

The Legal Entity Form must 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).

<sup>14</sup> concluded by the deadline of submission of offers

## 4 ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop 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 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 34 countries, namely: the 27 EU member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, FYROM, Albania and Montenegro).

The procurement (tender) procedures of Cedefop are **not** open to tenderers from GPA countries.

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 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 (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 is valid also for signature of the contract.

Partners in a joint offer assume joint and several liabilities 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.

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers. However the sub-contracting of persons/economic operators from non-eligible countries is limited to maximum 30% of the work by value.

The tenderer must clearly indicate the identity of each subcontractor and the percentage of work by value that he will perform for this contract (please fill in Annex G).

### **Only in cases when:**

- a subcontractor undertakes between 10% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

### **the tenderer should submit with the offer:**

1. the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective Subcontractor;
2. the required documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2;

3. 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 and total subcontracting does not exceed 40%), 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:

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

**TQV = Total Quality Value** of the tender, obtained as per point 5.1 (Total score for A.C.1-4);

**TFO = Total Financial Offer** of the tender (as per point 5.4);

**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 of the award (evaluation) criteria 1, 2 and 4 and in total a minimum of **65** out of 100 points (TQV) in the technical evaluation – see below).

### 5.1 Technical evaluation

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

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



<b>Award criteria</b>		<b>Points out of 100</b>
<b>Award criterion 1 (A.C.1) – Level of understanding of the nature of the assignment, its context and results to be achieved (25 points)</b>	<b>A.C.1.a.</b> Demonstration of an in-depth knowledge and understanding of the concepts and research issues related to skill mismatch and policies and practices that tackle it	10 points
	<b>A.C.1.b.</b> Demonstration of an in-depth knowledge and understanding of evaluating national policies in terms of their effectiveness, the links with national policy context and education and training and labour market institutions, and potential transferability to other countries	15 points
<b>Award criterion 2 (A.C.2) – Quality and appropriateness of the methods suggested to carry out the work (35 points)</b>	<b>A.C.2.a.</b> Relevance and soundness of the approach, the method and the tools proposed for carrying out the tasks in terms of terminology, method for data collection and analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications	20 points
	<b>A.C.2.b.</b> Rationales and proposed criteria for the selection of countries and policy initiatives for in-depth study and analysis as set out in point 2.3 part 2)	15 points
<b>Award criterion 3 (A.C.3) – Ability to include an additional number of countries and interviews with end-beneficiaries relative to the minimum requirements (20 points)</b>	<b>A.C.3.a.</b> Inclusion of additional countries beyond the minimum requirement of 10 (ten)	10 points
	<b>A.C.3.b.</b> Inclusion of additional interviews with end-beneficiaries beyond the minimum requirement of 4 (four) per policy initiative or action	10 points
<b>Award criterion 4 (A.C.4) – Organisation and management arrangements (20 points)</b>	<b>A.C.4.a.</b> Allocation of tasks, type and degree of involvement of the proposed experts	10 points
	<b>A.C.4.b.</b> Project organisation and mechanisms to guarantee successful and on-time delivery of tasks with adequate quality and risk management (clarity, coherence and feasibility of the work programme and timetable)	10 points

Tenders scoring **less than 50% of the possible score for each of the award criteria 1, 2 and 4 above**, and **less than 65 out of 100 in total** will not be considered acceptable and will therefore not have their financial proposal evaluated.

## 5.2 Technical proposal

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference above providing a practical, detailed description of the goods or services proposed for performance of the contract.

Tenderers are requested to organise the technical proposal in headings or to structure it in such a way as to ensure that the content of the technical proposal meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria. It is up to the tenderer to present 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.

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. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

For the technical evaluation of the proposal against the award (technical) criteria mentioned above, the tenderer must provide:

### **For award criterion 1**

A concise discussion of the subject demonstrating in-depth understanding of the scope and objectives of the study (maximum 5 pages)

### **For award criterion 2**

- detailed description of the envisaged qualitative research approach, methods, tools and processes, including a list of steps, potential data sources, envisaged ways to develop suitable interview protocols and rationale for the methodological approach proposed to analyse and synthesise the collected information;
- description of criteria for the selection of countries and policy initiatives for in-depth study and analysis and a justification that highlights how the envisaged criteria produce a sample of countries and policy initiatives that allow for sound analysis leading to meaningful policy conclusions

### **For award criterion 3**

- Inclusion of additional countries for in-depth analysis beyond the minimum requirement of 10 (ten). The bid with the highest number of countries proposed (minimum requirement of 10 (ten) plus any extra countries to be included) will receive 10 points, while the remaining tenderers will be awarded a number of points proportional to those of the bidder with the highest number of countries proposed, on the basis of the following formula:

$$\text{Points} = \frac{10 * \text{number of countries proposed for in depth-analysis (min 10)}}{\text{number of countries proposed by the bidder with the highest number of countries proposed for in-depth analysis}}$$

#### **Example:**

- Tenderer 1: number of countries proposed for in-depth analysis: 10
- Tenderer 2: bidder with highest number of countries proposed for in-depth analysis: 15

Points awarded to Tenderer 1:  $10 * (10/15) = 6.7$  points.

Points awarded to Tenderer 2: 10 points.

- Inclusion of additional interviews with end-beneficiaries beyond the minimum requirement of 4 (four) per policy initiative or action. The bid with the highest number of interviews with end-beneficiaries proposed (minimum requirement of 4 (four) plus any extra interviews with end-beneficiaries per policy initiative or action to be included) will receive 10 points,

while the remaining tenderers will be awarded a number of points proportional to those of the bidder with the highest number of interviews with end-beneficiaries per policy initiative or action proposed on the basis of the following formula:

$\text{Points} = \frac{10 * \text{number of interviews with end-beneficiaries per policy initiative or action proposed (min 4)}}{\text{number of interviews proposed by the bidder with the highest number of interviews with end-beneficiaries per policy initiative or action}}$
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Example:

- Tenderer 1: interviews with end-beneficiaries per policy initiative or action: 5
- Tenderer 2: bidder with highest number of interviews with end-beneficiaries proposed:

8

Points awarded to Tenderer 1:  $10 * (5/8) = 6.3$  points.

Points awarded to Tenderer 2: 10 points.

#### **For award criterion 4**

- composition of the proposed team, the nature and the extent of the team members' participation in the study and allocation of tasks, taking into account their respective expertise;
- detailed work plan illustrating intended organisation and management of the tasks, including:
  - timetable with descriptions of the deliverables;
  - arrangements for secure and easy communication with Cedefop;
  - detailed quality assurance and preliminary assessment of likely difficulties in carrying out the tasks (risk assessment and proposed measures to mitigate risks).

The tenderer shall identify a Project Co-ordinator within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Co-ordinator, or two different persons can be identified. 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 sub-contracting is above 40% of the work by value) as requested in point 4.2.

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

### **5.3 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 of the award criteria 1, 2 and 4 above will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered in the Price schedule table (see Annex H).

## 5.4 Financial proposal

The financial offer must be clear and in compliance with the tender specifications. The financial proposal should indicate the total price in order to carry out all the activities indicated in the Terms of Reference.

The tenderer must fill in the price schedule table available in **Annex H (financial offer)** and present a detailed breakdown of the price offered. The financial proposal should clearly match the Terms of Reference and take account of the estimate contract value. All services that shall be procured should be included, for the whole range of countries and interviews covered (including any additional countries for in-depth analysis and interviews with end-beneficiaries proposed as per point 2.3.2).

### Reimbursement of travel expenses

All costs incurred (travel, accommodation etc.) related to Cedefop's meetings and workshop as per point 2.6.a have to be included in the financial offer, point 2a) of the Table. Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in point 2.6.b, 1<sup>st</sup> paragraph 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 (point 2.6.b, 2<sup>nd</sup> paragraph), shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the Draft Contract).

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.

## 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:**

- cover letter (art. 4 of the invitation), signed by the person/s (name and position) 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 point 3.2
- 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 point 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 5.2, 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 containing all information requested in point 5.4 and Annex H.

## **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**



## **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](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](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.

**PLEASE NOTE:**

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

**Annex F:**  
**CHECK LIST OF MANDATORY DOCUMENTS**

**Annex G:**  
**QUESTIONNAIRES 1- 4**

## **Annex H:**

### **POWER OF ATTORNEY MODELS**

**MODEL 1 - POWER OF ATTORNEY**

**MODEL 2 - POWER OF ATTORNEY**

**Annex I:**

**MODEL OF LETTER OF INTENT FOR SUBCONTRACTOR/S**

**Annex J:**  
**CEDEFOP STYLE MANUAL**