



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 17/08/2009
RS/PRO/2009/688

OPEN INVITATION TO TENDER

AO/RPA/AZU-TODUN/Pilot-European-Employer-Survey/015/09

‘Developing and piloting an employer survey on skill needs in Europe’

Contract notice ref.: 2009/S 156-226976 of 15/08/2009

Dear Sir/Madam,

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

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

1. Tenders should be submitted preferably in English, but in any case in one (or in any) of the official languages of the European Union.
2. Tenders may be submitted exclusively in one of the following ways:
 - (a) by post to be dispatched not later than **05/10/2009**, in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

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

Important:

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

✓ that they have submitted an offer in time, and

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

Do not attach your offer to the confirmation e-mail or fax.

or

(b1) by courier service to be dispatched not later than **05/10/2009**, in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip,

or

(b2) delivered by hand not later than 17h00 on **05/10/2009**, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service**

Attention of Mr G. Paraskevaïdis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490111 / 490 064

Please note that Cedefop is open from 09h00 to 17h00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

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

Tenders must be submitted in a sealed envelope itself enclosed within a second sealed envelope. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

The **outer envelope**, addressed simply to Cedefop (address depending on the means of submission, see point 2 above), should only bear additionally **the name and address** of the sender.

The **inner envelope**, addressed to the Procurement Service as indicated under point 2 above, must bear a self-adhesive label with the indication **“Open Invitation to tender – Not to be opened by the internal mail service”** and all the necessary information, as shown below:

<p style="text-align: center;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/RPA/AZU-TODUN/Pilot-European-Employer-Survey/015/09</p> <p style="text-align: center;">‘Developing and piloting an employer survey on skill needs in Europe’</p> <p style="text-align: center;">Name of tenderer:</p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
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The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in point 6 of the attached tendering specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures. **It is a mandatory requirement for the tenderer to include in the offer a cover letter, signed by the person(s) authorised to sign the contract in case of contract award. The absence of such signed cover letter will lead to the rejection of the offer.**
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 **20/10/2009, 11h00** (local time). Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

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

additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Requests for additional information/ clarification should be received by 24/09/2009. No such requests will be processed after that date.

▪ The contracting authority may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.

Any additional information, including that referred to above, will be published on Cedefop's website. Please ensure that you visit regularly the site for updates.

After the opening of tenders:

▪ If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.

8. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
9. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. This decision must be substantiated and the tenderers notified.
10. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful tenderer.
11. Tenderers are informed that for the purposes of safeguarding the financial interest of the Communities, their personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel and/or to the European Anti-Fraud Office (OLAF).

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

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

Yours sincerely,

G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tendering Specifications

OPEN INVITATION TO TENDER

AO/RPA/AZU-TODUN/Pilot-European-Employer-Survey/015/09

‘Developing and piloting an employer survey on skill needs in Europe’

Tendering Specifications

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Introduction to Cedefop

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

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

4) Cedefop’s web portal www.cedefop.europa.eu includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.

5) Information about Cedefop’s publications, many of which can be downloaded, can be found at the Cedefop bookshop at http://www.trainingvillage.gr/etv/Information_resources/Bookshop/list.asp Cedefop’s wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

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

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

1 Overview of this tender

1.1 Description and type of the contract

- a) Title of the contract: ‘Developing and piloting an employer survey on skill needs in Europe’
- b) Cedefop will offer a single framework contract to the selected service provider/consortium to develop and pilot an employer survey to identify skill needs in all sectors of the economy in Europe and carry out related analyses. Such an employer survey will in the future provide Cedefop and other stakeholders with a source of qualitative and quantitative information on current and potential future skill needs in organizations of different sizes covering the whole economy (including non-marketed services) in each of the EU Member States.

The framework contract establishes the basic terms for a series of specific work assignments to be concluded over a period of maximum 4 years (4 x 1 year), particularly as regards the subject, price and implementing conditions.

For each specific work assignment, an order form will be issued by Cedefop. The order form and its annexes 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. For each work assignment, the contractor will be contacted by email and invited to submit a specific proposal to Cedefop within 25 working days (see Annex B – Draft Framework contract). The order form will be finalised upon agreement between Cedefop and the contractor in accordance with the Framework contract and its annexes.

The activities envisaged in the course of the framework contract will mainly contribute to Cedefop research on early identification of skill needs and skill mismatch (see description in ‘2. Technical specifications’).

In drawing up their bids, tenderers must take account of, and thus accept, the terms and conditions of the standard framework contract attached to the specifications (Annex B).

- c) Type of contract: service (framework) contract

1.2 Place of delivery or performance

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

1.3 Division into lots

This invitation to tender is not divided into lots.

1.4 Variants

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

1.5 Value or quantity of purchase

The following estimated total budget is foreseen over the entire duration of the framework contract (maximum 4 years).

Total budget (estimate)	2.000.000 €
Phase 1 work assignment (budget estimate)	500.000 €
Phase 2 work assignment (budget estimate)	400.000 €
Phase 3 work assignment (budget estimate)	900.000 €
Any possible additional assignments during the course of the Framework contract (budget estimate)	200.000 €

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least 6 months following the tender submission date, i.e. until **05/04/2010**.

1.7 Duration of the contract

The resulting framework contract shall enter into force on the date of signature of the last contracting party, i.e. Cedefop, and shall be valid for a period of **1 year**. It may be automatically renewed up to three (3) times, each time for an additional period of one (1) year, covering a total acquisition period of **four (4) years (1+1+1+1)**.

1.8 Start date and period of execution

The scheduled date for entry into force of the framework contract, as a guide, is: **01/12/2009**. The actual date on which performance of the tasks is to start will be stipulated for each work assignment in accordance with Cedefop's needs.

1.9 Publication rights and intellectual property

Any results or rights, including copyright and other intellectual or industrial property rights, obtained in performance of the Contract, shall be owned solely by Cedefop and the European Commission, which may use, publish, assign or transfer them as it sees fit, without geographical or other limitation. Please note that Cedefop shall not be required to distribute or publish documents or information supplied in performance of the Contract.

Documents based in whole or in part upon the work undertaken in the context of the contract may be published by the Contractor given prior written approval by Cedefop.

1.10 Main terms of financing and payment

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

2 Technical specifications

2.1 Introduction

This invitation to tender is being issued against the background of widely recognised need and growing interest in the early identification and anticipation of skill and competence needs. New and changing skill needs constitute challenges for policy, practice and research in their attempt to achieve wider social and economic goals, particularly the cohesion and competitiveness of the European Union, and to improve the links between education, training and the labour market. This becomes particularly important in times of an unprecedented crisis. Timely and reliable information on how skill needs will develop in the coming years is therefore essential for employers, for education programmes' design, for the provision of counselling and guidance services, and for efficient human resource development and labour market policy making at all levels: enterprise, local, regional, national and European.

The future development of skills – both demand and supply – on the European labour market ranks high on the current policy agenda. The "New skills for new jobs" initiative launched by the European Commission in 2008 following the Council resolution of November 2007 confirms the importance of identifying and anticipating skill needs for Europe. The Spring Council 2008 concluded to undertake a comprehensive assessment of the future skills requirements in Europe up to 2020, taking account of the impacts of technological change and ageing populations and to propose steps to anticipate future needs. Consequently, the Integrated Guidelines for Growth and Jobs 2008-2010, ask for better anticipation of skill needs, labour market shortages and bottlenecks to improve matching of labour market demand and supply. The Communication of the European Commission on "New skills for new jobs" (December 2008) also emphasises the need to improve the capacity to assess and anticipate skill needs and to ensure better matching of skills and jobs. In March 2009, the Council invited the Commission to develop the "New Skills for New Jobs" initiative further and to monitor the European labour markets, including establishing a regular assessment of skill supply and skill needs. The Communication of the European Commission on a shared commitment for employment (June 2009) emphasizes in this context the necessity of upgrading skills, strengthening lifelong learning and matching labour market needs. Better matching of skills and jobs, however, requires better information on employers' needs and requirements in terms of skills, competences and qualifications.

2.2 Cedefop's work in the field of identification of skill needs

In 2002, Cedefop, together with a number of researchers and stakeholders from EU and future Member States, launched an initiative on early identification of skill needs documented by conferences and publications. The main aim was to make activities in the field more transparent and to present and discuss those activities with representatives from the fields of research, policy and practice. In the medium term, its aim was to foster cooperation and to establish a network. As a result, the international network on early identification of skill needs 'Skillsnet' was established by Cedefop in 2004 (http://www.cedefop.europa.eu/etv/Projects_Networks/skillsnet/).

To identify future skill needs and potential skill mismatch at European level, Cedefop currently undertakes various research activities, including producing regular European skill supply and demand forecasts. Cedefop also investigates skill and competence needs in selected sectors and explores a common European approach to employer surveys on skill needs. All these activities support the implementation of the European Commission's initiative on new skills for new jobs mentioned above.

In this context, Cedefop's activities of skill forecasting and exploring employer surveys are supported financially by the Progress Programme managed by the European Commission, Directorate General for Employment, Social Affairs and Equal Opportunities.

2.2.1 *Skillsnet – International network on early identification of skill needs*

Skillsnet brings together highly qualified experts to present and discuss research and analysis methods and outcomes in the field of new and changing skill needs as well as the medium- to longer-term perspectives for skills on the labour market. The network provides a forum where new activities and

projects to identify skill needs at an early stage can be generated in a multidisciplinary cross-country perspective. As transferring findings into policy and implementing reforms is of central importance and remain a key challenge, Skillsnet actively involves policy-makers, social partners, practitioners and researchers in discussions on research outcomes. This is to ensure the acceptance and legitimacy of reforms and to foster their implementation.

2.2.2 Forecasting activities ⁽³⁾

Cedefop's forecasting activities comprise a system for regular medium-term forecasts of occupational skill needs (demand and supply) in Europe based on available comparative data to provide various labour market actors and participants, including policy-makers, with useful evidence of future labour-market developments and in particular on the skills and occupations that will be required. In 2008, the first forecast was published for EU-25, Norway and Switzerland covering the period 2006-2015 ⁽⁴⁾ with a preview until 2020 on future employment developments by economic sector, occupation and qualification ⁽⁵⁾.

In order to anticipate possible future imbalances on the European labour markets, and to inform policy makers and other actors in time, it is deemed necessary to complement the demand forecast by a supply-side projection of the future skills of the labour force. Therefore, in June 2009 Cedefop published a new medium to long-term forecast (10-15 years) of the supply of skills in Europe ⁽⁶⁾ based on available comparative data and covering all 27 EU Member States, Norway and Switzerland.

Current forecasts, however, provide quantitative results at macro level only. To improve the knowledge base, it is necessary to complete this quantitative data by other sources of information. Employer surveys might be one of the possible sources which can provide complementary – also qualitative - information on skill and competence needs at the workplace.

2.2.3 European employer survey on skill needs ⁽⁷⁾

In 2007, Cedefop started a new initiative to explore the potential of employer surveys as a tool to identify skill needs and skill gaps, and to find a common European approach to obtain information and data from employers on their skill needs.

The first workshop on enterprise surveys as a tool for the identification of skill needs was organised in June 2007 in Bucharest. Participants reviewed existing surveys at European and national level potentially relevant to skill needs analysis, and started the discussion on the possible comparability and compatibility of enterprise surveys in the EU MS. In the framework of this initiative, MS' experts were invited to submit brief information on their national enterprise surveys based on a template prepared by Cedefop's Skillsnet team. Answers from participants showed that they are willing to discuss possibilities how to make their surveys comparable with each other. However, this is seen as a long-term process. Other solutions suggested during the discussion referred to the modification/extension of existing enterprise surveys at European level (e.g. CVTS) and the possible development of a new specific European-wide enterprise survey. Following up the workshop discussion, Cedefop prepared a conceptual outline to assist future development of the new initiative, identifying its objectives, benefits for the EU and individual MS, target group and beneficiaries.

The second workshop in Paris in May 2008 discussed the conceptual outline concluded with three options: adjusting national surveys to achieve comparability of results, modifying existing European surveys by including questions on skill needs, launching a new European employer skills survey. It was

⁽³⁾ http://www.cedefop.europa.eu/etv/Projects_Networks/Skillsnet/forecasting.asp

⁽⁴⁾ Cedefop: *Future skill needs in Europe, Medium-term forecast: synthesis report*. Luxembourg: Office for Official Publications of the European Communities, 2008. Available from internet:

http://www.trainingvillage.gr/etv/Information_resources/Bookshop/publication_details.asp?pub_id=485

⁽⁵⁾ http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=498

⁽⁶⁾ Cedefop: *Future skill supply in Europe, Medium-term forecast: synthesis report*. Luxembourg: Publications Office, 2009. Available from internet:

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=546

⁽⁷⁾ http://www.cedefop.europa.eu/etv/Projects_Networks/Skillsnet/employers_surveys.asp

agreed that suggested alternatives are not mutually exclusive and that a feasibility study for an employer survey is needed to identify the most practicable solution of the suggested three options.

The feasibility work started in the beginning of 2009 and the interim findings were discussed with Skillsnet experts at the third workshop in Milan in May 2009 ⁽⁸⁾. In particular experts discussed: the key issues of different approaches assessing skill needs relevant to employer surveys; the characteristics of the national surveys on employers presently available in the Member State, in order to provide the basis for possible adjustments; the characteristics of EU surveys, in order to identify which is/are the one/ones that could be modified by including questions on skill needs, skill development and relevant strategies in enterprises.

The feasibility study ⁽⁹⁾ concludes that the only option that allows full comparability of results across countries is a new survey at European level dedicated specifically to the identification of skill needs in enterprises. However, work on the use of the CVTS as an existing European survey should continue, and the harmonisation and adjustment of existing national surveys by Member States should be further explored in parallel. Therefore, the survey envisaged with this tender should serve primarily as an independent tool but also as a basis for specific module to be possibly used in existing EU or national survey(s) by Member States.

2.3 General purpose of this contract

The purpose of this contract 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. The piloting should verify the whole survey approach and statistical methodology, including the relevance of the questions and availability of information/data in enterprises. As a result, a detailed, robust and validated methodology should be made available for future regular use at EU-27 level that ensures data according to agreed international quality standards.

The contract covers the final refinement of the required survey outcomes and related data needs, development of a survey instrument (questionnaire and appropriate statistical methodology), preparation of a pilot survey, including development of national versions of the questionnaire, and implementation of the pilot survey, including fieldwork, data processing and reporting.

2.4 Work packages, tasks and planning

The work will be carried out in three main phases. Execution of the second and third phase will be conditional to the satisfactory completion of the prior phase and availability of the budget. The three distinct phases with related work packages will be subject to different order forms.

The results in different stages of the work will be discussed with country expert members of Cedefop's Skillsnet and contractor will have to take into account relevant comments and suggestions. These discussions will be organised by Cedefop and are not subject of this contract (see also 2.6).

The following work packages and related tasks are defined for each phase that is foreseen over the duration of the framework contract with the indication of the estimated year of their start:

Work package	Task	Estimated year of start
Phase 1: Development of the survey instrument		
WP1	Specification of required survey outcomes Fine-tune in collaboration with Cedefop and a group of national experts in detail the required outcomes of a new survey and related data needs (based on the feasibility study results). Identify the key political and research questions that the survey should answer. The results of the feasibility study should be considered.	2009

⁽⁸⁾ The conclusions of the workshop are available at:

http://www.cedefop.europa.eu/etv/Projects_Networks/Skillsnet/events.asp?idnews=4497

⁽⁹⁾ The draft final report of this study is available for tenderers upon request from Cedefop.

WP2	<p>Statistical methodology and survey guidelines</p> <p>Develop a detailed and complete employer sample survey to collect representative data according to the firm size and economic sector on skill needs in Europe. The detailed statistical methodology should mainly include: concepts, definitions and classifications to be used; implementation guidelines (organisation/planning and methods of data collection, strategies to achieve the required net sample size); sampling (required sampling frame, target population and statistical unit, sample size calculation method to ensure given precision requirements, sampling and weighting methods, estimation methods); data processing (standard code book, editing and checking rules, treatment of unit and item non-response).</p>	2009
WP3	<p>Development of the master questionnaire</p> <p>Develop an English master questionnaire. In close cooperation with Cedefop and country expert members of Skillsnet transform the required policy/research outcomes of the survey into specific questions and statistical measurable variables. Questions must be properly developed for the comparative context and use a language understandable to enterprises and employers to enable the most valid, reliable and comparable measurement. The questionnaire must be accompanied by a list of definitions for key terms used in the questions.</p>	2009
Phase 2: Improvement of the questionnaire and pilot survey preparation		
WP4	<p>Development of national questionnaires and pre-tests</p> <p>Select in cooperation with Cedefop a balanced combination of 5-6 countries (size, geographical location, economic development, etc.) where pilot survey should take place. Propose a rigorous translation and assessment strategy ensuring the highest quality of national questionnaires (use of back translation desirable). Translate the master questionnaire and develop respective national questionnaires. Develop and carry out pre-tests in the target countries, analyse the results and revise the master and national questionnaire(s) in the light of the outcome of the pre-tests.</p>	2010
WP5	<p>Preparation of the pilot survey</p> <p>Based on the developed statistical methodology and survey guidelines develop a detailed planning and organisation as well as timetable and quality control measures for all stages of the practical implementation of the pilot survey in selected countries. Produce a manual/handbook to be used in countries for pilot survey implementation.</p>	2010
Phase 3: Implementation of the pilot survey		
WP6	<p>Fieldwork</p> <p>Carry out the pilot survey/fieldwork and collect data according to the agreed survey methodology and guidelines, including the implementation of procedures and quality measures to ensure the required net sample size and data quality. Ensure the required basis for non-response analysis. Progress reports detailing achievements during fieldwork to be provided to Cedefop regularly.</p>	2011
WP7	<p>Data processing and quality assessment</p> <p>Process, edit and check the data according to the developed methodology. Implement item non-response treatment, and weighting and estimation procedures. Produce quality reports for each of the countries including technical aspects and stages of the survey implementation (use the Eurostat standard quality report as a guide).</p>	2011
WP8	<p>Data analysis, summary pilot survey report and comprehensive manual for the final survey instrument</p> <p>Analyse the data and provide summary of the survey results on skill needs in selected countries. Provide conclusions regarding the required outcomes achieved and their relevance for the key political and research questions identified within WP1. Prepare a final summary technical report of the pilot survey. Based on the experiences and outcomes of the pilot survey, produce a comprehensive and detailed manual/handbook for an employer survey on skill needs in Europe, including the validated questionnaire, the detailed statistical methodology and survey guidelines, for future potential regular use in all Member States.</p>	2011

There may be additional work packages/tasks during the course of the framework contract which cannot be specified at this stage (see table in point 1.5 for an indication of budget estimate). Cedefop will, as a guide, provide an annual schedule of anticipated requirements.

2.5 Deliverables (reports) and timetable

The specific activities and reports covered by this framework contract must be implemented by the deadlines which will be laid down by Cedefop in the order forms.

However, an indicative calendar of activities and deliverables is the following:

Phase 1 work assignment: Development of the survey instrument

The phase 1 work assignment should focus on the following work packages (as indicated in 2.4):

- WP1 – Specification of required survey outcomes
- WP2 – Statistical methodology and survey guidelines
- WP3 – Development of the master questionnaire

Indicative calendar for the phase 1	Related meetings with project managers at Cedefop
<ul style="list-style-type: none"> • start of the work: December 2009 • interim report: May 2010 • final report: October 2010 	<ul style="list-style-type: none"> • at the start of the work (an inception meeting) • upon submission of the interim report • at the end of the phase (the final results meeting)

Phase 2 work assignment: Improvement of the questionnaire and pilot survey preparation

The phase 2 work assignment should focus on the following work packages (as indicated in 2.4):

- WP4 – Development of national questionnaires and pre-tests
- WP5 – Preparation of the pilot survey

Indicative calendar for the phase 2	Related meetings with project managers at Cedefop
<ul style="list-style-type: none"> • start of the work: November 2010 • interim report: January 2011 • final report: March 2011 	<ul style="list-style-type: none"> • at the start of the work (an inception meeting) • upon submission of the interim report • at the end of the phase (the final results meeting)

Phase 3 work assignment: Implementation of the pilot survey

The phase 2 work assignment should focus on the following work packages (as indicated in 2.4):

- WP6 – Fieldwork
- WP7 – Data processing and quality assessment
- WP8 – Data analysis; pilot survey report and comprehensive manual for the final survey instrument

Indicative calendar for the phase 3	Related meetings with project managers at Cedefop
<ul style="list-style-type: none"> • start of the work: April 2011 • interim report: September 2011 • final report: December 2011 	<ul style="list-style-type: none"> • at the start of the work (an inception meeting) • upon submission of the interim report • at the end of the phase (the final results meeting)

The following reports will be required within each phase:

Short inception report is due 1 month after the kick-off meeting and will in particular confirm and/or clarify the rationale of sources to be used, the methodology, the workplan and timetable for the research.

Interim report will present work progress, the structure of the final outcome, intermediary findings and indicative conclusions (if possible).

Final report should include a summary and key findings, a detailed presentation of the methodology and results, conclusions and recommendations in the following structure:

- executive summary with key findings and conclusions of the respective phase (approx. 20 pages);
- a comprehensive summary report presenting the approaches and main results (approx. 100 pages);

- a technical background report with detailed results including detailed description of the methodology, software and data used as well as annex with tables.

Cedefop will provide comments on both the interim report and the final report. The contractor will address those comments, liaising closely with Cedefop's project manager.

Payment of the balance is conditional on Cedefop's acceptance of a revised final report.

Reports shall be submitted to Cedefop in English. They should be submitted in Microsoft Word with all tables, graphs or images included at the appropriate place in the text. The report shall be supplemented by any graphs, tables and images in the appropriate software and by the statistical databases used during research (to allow for Cedefop's check). The data must be delivered in electronic format as an SPSS save file. This file must contain all raw data gathered for all countries covered by the survey, plus national and cross-national weighting information. All labelling must be in English and will be made as user-friendly as possible within the constraints of the SPSS-PC (e.g. using key words). The syntax files used for data processing and weighting must be supplied. In addition, it is required to deliver the data in ASCII text data file in fixed-format (i.e. values padded to fixed character widths) or in comma-delimited format, so it can be used by software other than SPSS if required.

Reports shall be drafted in compliance with the requirements of Cedefop style manual attached in Annex G.

Reports should be edited by a researcher in the field being either an English native-speaker or having an equivalent proficiency level to ensure a good readability.

2.6 Meeting and travel expenses

The contractor will be requested to attend three one-day scheduled meetings (1-2 persons) at Cedefop with the team responsible for skills analysis as referred in point 2.5. All costs incurred (travel, accommodation, etc.) related to Cedefop's meetings as well as other travel, accommodation, etc. expenses that may occur in performing the tasks as described in points 2.4 and 2.5 (research team meetings, etc.) have to be included in the financial offer in Annex H (estimated costs/trip per person).

The contractor will be asked to present the proposal and results achieved so far during the Skillsnet conferences/expert workshops/focus groups on employer surveys as a tool for identification of skill needs (see also point 2.4). This will enable the contractor to discuss the methodology with European experts and stakeholders in the field. The related travel expenses for Skillsnet conferences/expert workshops shall be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract in Annex B).

Other meetings with Cedefop apart from those mentioned above that might be needed in performing the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its regulation (see Annex IV of the draft contract in Annex B).

3 Specific information concerning participation to this tender

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

In case any document concerning exclusion (point 3.1) and/or selection criteria (point 3.2) is missing, the tender will be automatically rejected. Cedefop reserves the right to request additional information, if needed, only on documents included in the tender. Missing documents as such will not be requested. The tenderer should thoroughly check whether he has included all requested information (see check-list in Annex F).

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all consortium members (if any) and all subcontractors specified as per point 4.2, 2nd sub-paragraph (if any) shall provide the self-declaration found in Annex C duly signed and dated.

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

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

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

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

3.2 Selection criteria

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

Economic & Financial capacity

Requirement

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

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

- a statement of overall company (or consortium, if applicable) turnover supported by Audited Financial Statements including the Profit and Loss Account or equivalent for each of the last three years to prove that the average turnover of the tenderer over that period was at least **500.000,- €**
- a statement of turnover concerning the type of services covered (EU-scale projects) of at least **200.000,- €** during each of the last three financial years.

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

Technical and professional capacity

Requirement

The service provider must comply with the following criteria:

- qualifications, knowledge, skills and ability of the tenderer and the expert(s) to perform the tasks outlined in the technical specifications;
- proven experience in the field of empirical research described above (design of international and/or employer/enterprise surveys), including handling and analysing appropriate national and international data sets and capacity to apply this experience to the development of employer surveys on skill needs at European level;
- solid experience in international activities and comparative analysis related to education, training or employment issues;
- ability to cooperate with cross-national network of researchers in the field of skills needs in Europe (Cedefop's Skillsnet), to improve the data, methods and results;
- linguistic ability incl. capacity to understand, speak and write fluently to a high standard in English during the entire course of the project.

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

- description of the professional capacity of the tenderer, especially with regards to the related field of research and linguistic ability, attested by the detailed CVs of those involved in providing the services;
- a list of similar contracts/projects/studies carried out by the tenderer over the past 5 years in the relevant field of research, attested also by a list of (scientific) publications;
- a list of relevant associations and networks where the tenderer is or has been a member over the past 10 years, including the specification of his involvement;
- a description of the tenderer's study and research capacity (expertise, facilities, etc.) to design employer/enterprise surveys and to select, handle and analyse appropriate national and international data sets.

3.3 Legal Position

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

4 Additional information concerning participation to this tender

4.1 Participation of consortia

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

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria 'technical and professional capacity', the evidence

provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

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

4.2 Subcontracting/Subcontractors

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

The tenderer must indicate clearly which parts of the work will be sub-contracted, and additionally specify the identity of those subcontractors only undertaking more than 10% of the work by value, provided total sub-contracting is not above 40% of the work by value. If total sub-contracting is above that ceiling, each and every sub-contractor, independently of his contribution to the work by value, must be identified. The subcontractor(s) (if any) have to provide the documents for the parts that are relevant to them.

All subcontractors identified as per the second sub-paragraph must also provide the required evidence for the exclusion and selection criteria.

Concerning the selection criteria 'technical and professional capacity', the evidence provided by each subcontractor will be checked to ensure that the tenderer and all subcontractors together fulfil the criteria.

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

5 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria (see 3.1. and 3.2.) will be evaluated in terms of quality and price.

A score will be calculated for each tender that has satisfied the above requirement. A Framework contract shall be awarded to the one tenderer who obtains the highest score according to the following formula:

$$Score = Quality\ points + \left[20 * \frac{Lowest\ Total\ Price}{Total\ Price} \right]$$

where

- Quality points are the points awarded to the proposal through the technical evaluation by application of Award Criteria 1 to 4 (see 5.1. and 5.2.);
- 'Total Price' (TP) is the total cost of all workdays for all work assignments (3 phases) , i.e. the sum of the total number of workdays x Daily price for each three staff categories (see 5.3. and 5.4.), and all other costs of a proposal;
- 'Lowest Total Price' is the TP as defined above that has been indicated in the lowest financial proposal among all tenderers.

The formula allows for rating proposals on the basis of both quality (technical proposal) and prices and costs (financial proposal).

The proposal with the lowest prices and costs will be given advantage by getting the maximum points (20 points). The number of points attributed to any other financial proposal will be determined by the ratio 'Lowest TP divided by this proposal's TP'. The bigger the gap between the lowest proposal and another offer, the fewer the points gained by this other offer.

5.1 Technical evaluation

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

- Award criterion 1 – Sound understanding of the purpose of the activities to be carried out in the context of the framework contract (10 points);
- Award criterion 2 – Relevance and soundness of the methods and approaches proposed to carry out the tasks (45 points);
- Award criterion 3 – Appropriateness of the expertise proposed in terms of allocation of human resources/experts and in relation to the type of activities to be carried out, including external expertise in case of consortium or sub-contracting (15 points);
- Award criterion 4 – Project organisation and mechanisms to guarantee continuous services in adequate quality and expertise during the entire duration of the framework contract, including relevant risk assessment (10 points).

Quality will be rated by applying Award Criteria 1 to 4 (See 5.1.). Tenders scoring less than **50 (of a maximum of 80) points in total** against the award criteria or **less than half the points in the award criteria 2 and/or 3** will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2 Technical proposal

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

- a concise discussion of the subject demonstrating in-depth understanding of the objectives, concepts, methodologies and research issues on skill measurement;
- a detailed description of the methods and approaches to be followed to carry out the tasks specified in all work packages (see the structure and specifications in 2.4);
- a description of the work organisation and management, i.e. the team to be assigned to the project, the expertise of its members in terms of distribution of tasks among them, including external expertise in case of consortium or sub-contracting;
- a detailed time-table with descriptions of the deliverables and different stages of work to ensure that the project organisation can mobilise the adequate expertise and respond appropriately to the request from Cedefop for each specific work package, including an analysis of the difficulties likely to be encountered (methodological and others) in carrying out the work and an indication of how the tenderer intends to address these difficulties (risk assessment).

In addition to the above the tenderer must clearly specify which parts of the work will be sub-contracted (if any) as requested in point 4.2 (second paragraph).

5.3 Financial evaluation

The financial evaluation will be made on the basis of the **daily fees x estimated total number of working days** and of the **total other costs** (travels, equipment, address register costs, etc.) for each phase as defined in points 2.4 and 2.5.

As mentioned in the last paragraph of point 2.4, there may be additional work assignments to those already defined in these technical specifications during the course of the framework contract, which cannot yet be specified by Cedefop. Such additional work assignments will be subject to a separate order form and complementary funding (see table under 1.5).

However, the tenderer is **not** requested to submit any price for these additional work assignments in his financial offer. The price that would be applied for any additional work during the performance of the contract will be a function of daily fees (as indicated in the tenderer's financial proposal) according to the level of seniority and secretarial/assistant support and of the other costs in comparison with existing similar work assignments.

5.4 Financial proposal

The financial proposal should indicate daily fees according to level of seniority of the proposed experts, other fees (secretary and assistant support, etc.) and other costs (travels, equipment, data and address register costs, etc.) to carry out the activities indicated in the technical specifications. The tenderers must present a detailed breakdown of the price offered in the financial offer form table in Annex H.

Information concerning price

- The prices quoted must be fixed and not revisable (for the first year of the contract). Price revision may apply as from the beginning of the second year of implementation (see draft Framework Contract in Annex B).
- Prices must be quoted in euro and include all expenses.
- Travel expenses (see point 2.6) must be included unless specified otherwise.
- Under articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

6 Information on presentation and content of tender

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

- the checklist found in Annex F (please refer to point 3)
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in point 3.2
- the legal entity form as requested in point 3.3 and found in Annex D
- a statement containing the name and position of the individual(s) entitled to sign the contract
- the financial identification form as found in Annex E

6.2 Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

- the technical proposal providing all information requested in point 5.2 including information relevant to subcontracting as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the financial proposal containing all information requested in point 5.4 (Financial Offer Form in Annex H as filled).

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT FRAMEWORK CONTRACT

ANNEX C

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

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

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

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

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

official address in full:

VAT registration number:

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

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

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

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

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

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

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

In addition, the undersigned declares on their honour that:

g) they have no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties or any other relevant connection or shared interest;

- h) they will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;
- i) they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- j) they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to award of the contract;
- k) that the information provided to Cedefop within the context of this invitation to tender is accurate, sincere and complete;
- l) that in case of award of contract, they shall provide the evidence that they are not in any of the situations described in points a, b, d, e above' specifically:

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

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

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

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

Full name

Date

Signature

ANNEX D

LEGAL ENTITY FORM

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

http://ec.europa.eu/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

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

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

PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please Tick ✓ the boxes provided

<u>Mandatory documents to be included as part of the tender</u>	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u> one original and one copy of: - this checklist		<input type="checkbox"/>	<input type="checkbox"/>	
- a duly signed cover letter				
- exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	3.1, 4.1, 4.2 & Annex C	<input type="checkbox"/>	<input type="checkbox"/>	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2	<input type="checkbox"/>	<input type="checkbox"/>	
- legal entity form	3.3 & Annex D	<input type="checkbox"/>	<input type="checkbox"/>	
- name and position of the individual(s) entitled to sign contract	3.3	<input type="checkbox"/>	<input type="checkbox"/>	
- financial identification form	6.1 & Annex E	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u> one original and three copies of:				
- the technical proposal	5.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original and three copies of:				
- the financial proposal	5.4 & Annex H	<input type="checkbox"/>	<input type="checkbox"/>	

You should also ensure that:

<input type="checkbox"/>	your offer is formulated in one of the official languages of the European Union.
<input type="checkbox"/>	both the technical and financial proposals of the offer are signed by you or your duly authorised agent.
<input type="checkbox"/>	your offer is perfectly legible in order to rule out any ambiguity.
<input type="checkbox"/>	your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
<input type="checkbox"/>	the outer envelope bears the information mentioned in the invitation to tender point 3.

ANNEX G

CEDEFOP'S STYLE MANUAL

ANNEX H

FINANCIAL OFFER FORM