

**CEDEFOP**European Centre for the Development
of Vocational Training

FINANCE AND PROCUREMENT

RS/PRO/CALU/2013/RB(2013)01027
Thessaloniki, 27 May 2013

OPEN INVITATION TO TENDER

Supporting continuing professional development of trainers in enterprises AO/ECVL/IJE/In-company trainers professional development/006/13

REFERENCE: *Contract notice - 2013/S 100-170262 of 15/05/2013*

Dear Sir/Madam,

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

The purpose of this tender procedure 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 their 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. Paraskevaïdis
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) 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

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

or

(b2) delivered by hand not later than **the date and time specified in the timetable in point 8 below**, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

to the following address (for points **(b1)** and **(b2)** above):

**European Centre for the Development of Vocational Training
(Cedefop),
Procurement Service, Attention of Mr G. Paraskevaidis
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 to Cedefop (address depending on the means of submission, see point 2 above), should only bear **the name and address** of the sender.

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

OPEN INVITATION TO TENDER

CEDEFOP No: AO/ECVL/IJE/ In-company trainers professional development /006/13

‘Supporting continuing professional development of trainers in enterprises’

Name of tenderer:

NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must 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 who is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure (see also point 1 of the Tender Specifications).
5. Submission of a tender implies acceptance of all the terms and conditions set out in this Invitation to Tender, in the specifications and in the draft contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on the date and time specified in the timetable in point 8 below. Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

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) 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 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 request 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 requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	28/06/2013	17.00h
Last date on which clarifications are issued by Cedefop	As soon as possible	N/A
Deadline for submission of tenders (hand delivered)	08/07/2013	17.00h
Deadline for submission of tenders by post / courier	08/07/2013	N/A
Validity of the tenders	08/01/2014	N/A
Tender opening session	22/07/2013	11.00h

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

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

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

10. All costs incurred in preparing and submitting tenders 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.

You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data

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

Yours sincerely,

G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

***AO/ECVL/IJE/ In-company trainers
professional development /006/13***

***‘Supporting continuing professional development
of trainers in enterprises’***

Tender 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 (VET) systems 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, the Member States ⁽¹⁾ 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:

- monitoring VET policy developments and reforms in the 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 policies. 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 freely between countries and sectors.

The Member States define national VET policies and Cedefop monitors and reports on the impact of the reforms and changes on their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with the 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

⁽¹⁾ Cedefop also works with Iceland and Norway.

and study abroad and move between different parts of a national education and training system (for example, between general and vocational education).

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

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

New demands are also set for VET teachers and trainers and Cedefop is looking at their changing roles, competence requirements 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 job 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 looking into 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 on skill needs of the 'silver' economy.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal 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 the web portal, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and on Twitter at www.twitter.com/cedefop.

1. OVERVIEW OF THE TENDER

In submitting the tender in response to this procedure, 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 and terms of business may be, which he hereby waives. No account can be taken of any reservation or disclaimer expressed in the tender as regards the tender dossier's Tender Conditions and Specifications and the Contract's Special and General Conditions. If necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7.1 of the Invitation to tender. Any reservation or disclaimer may result in the rejection of the tender without further evaluation on the grounds that it does not comply with the conditions of the Tender Dossier.

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 Technical and Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

a) *Title of the contract:*

'Supporting continuing professional development of trainers in enterprises'

b) Short description of content of this contract:

The study aims to improve the understanding of policies and practice that support the quality of training in enterprises through the development and updating of in-company trainers' competences. The study will bring evidence on how enterprises support training of their employees and more specifically, how they identify, nominate/recruit and support trainers in companies and how they develop and upgrade their competences. The study will also propose recommendations for policy-makers, regional authorities and organisations, sectoral organisations, employers, and in-company trainers on how to create better opportunities for equipping in-company trainers with necessary competences.

c) Type of contract: direct service.

1.2. Place of delivery or performance

The tasks must be completed outside Cedefop in the Contractor's premises.

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers may not offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **220,000 Euro** (without VAT).

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have duration of **14 (fourteen)** months.

1.7. Main terms of financing and payment

Payments will be made within 60 days of submission of invoices and at the conditions set out in the draft contract.

2. TERMS OF REFERENCE

2.1. Background

2.1.1. Introduction

The European Union will not resume growth driven by higher productivity and innovation without highly skilled workers who can contribute to innovation and entrepreneurship. Companies do not only need new skills, the right competences and innovative thinking; where appropriate, the existing workforce must constantly update their knowledge, skills and competences to meet new demands and future changes.

The increased policy attention to training and learning at the workplace for adults, in enterprise, is linked to:

- the need to equip people with job-specific and transversal skills that contribute to productivity and innovation of European enterprises and address skill mismatches;
- the need to improve training opportunities for working adults, including incentives to companies to provide adult training (European Commission, 2012 ⁽²⁾) and make lifelong learning a reality.

Training at the workplace plays an important role and is increasingly recognised as an efficient way to equip people with transversal and job-specific skills. It also contributes to the European 2020 headline target stipulating that, by 2020, 15% of the population aged 25 to 64 should participate in lifelong learning.

Cedefop's studies point to the benefits and specificities of learning in enterprise:

- (a) training provision in companies varies considerably in the Member States and the professional management of training, involvement of social partners and targeted public measures are crucial to foster training in companies (Cedefop, 2010 ⁽³⁾);
- (b) there are gaps in enterprises' perception of skills and training needs (Cedefop, 2010 ⁽⁴⁾);
- (c) trainers need to go beyond conveying vocational knowledge and skills and support workers in learning within work practice, aid learning

⁽²⁾ European Commission (2012), [Rethinking education: Investing in skills for better socio-economic outcomes](#), Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM(2012) 669 final.

⁽³⁾ Cedefop (2010), [Employer-provided vocational training in Europe: evaluation and interpretation of the third continuing vocational training survey](#). Luxembourg: Publications Office. Cedefop research paper No 2.

⁽⁴⁾ idem

processes and stimulate learning capacities of enterprise (Cedefop, 2011⁽⁵⁾);

- (d) tasks complexity (learning-intensive forms of work organisation) and human capital formation in enterprises are major driving factors of innovation in enterprise (Cedefop, 2012⁽⁶⁾).

According to a recent study (European Commission; Danish Technological Institute, 2012)⁽⁷⁾, European enterprises tend to develop necessary competences internally as much as possible, including general and basic skills, while external provision is called for only for highly specialised skills, and to rely on improving the competences of the existing staff rather than recruiting new staff as a general strategy to ensure the right mix of skills in the companies. Workplace learning represents the main form of training in small and medium-sized enterprises ([SMEs](#)) though they tend to provide little training to their staff and depend heavily on external support instruments and policies and on SME friendly environments⁽⁸⁾.

The increased focus on workplace learning, its quality and outcomes leads to the awareness of the significant role of those who provide formal and non-formal learning in companies, full time or as part of their job tasks (for the purpose of this study, they will be referred to as **in-company trainers**). This also sets new expectations and requirements to their competences. Supporting in-company trainers at different levels and through different channels is likely to bring the biggest returns in terms of companies' productivity, competitiveness and innovation. In the above mentioned study though, European enterprises thought that the EU can play a significant role in developing support system aimed at developing quality trainers and training in enterprise.

The Bruges Communiqué⁽⁹⁾ invites the Member States to improve the initial and continuing training for VET trainers so that they have opportunities to acquire the right set of competences and be prepared to take up broader and more complex training-related tasks they face today. In its Communication 'Rethinking education: Investing in skills for better socio-economic outcomes'⁽¹⁰⁾, the European Commission pointed to the need to establish a competence framework or professional profile for trainers in initial and continuing VET. The [Thematic Working group on professional development of VET trainers](#) works to collect

⁽⁵⁾ Cedefop (2011), [Learning while working: success stories on workplace learning in Europe](#). Luxembourg: Publications Office.

⁽⁶⁾ Cedefop (2012), [Learning and innovation in enterprises](#), Luxembourg: Publications Office, Cedefop research paper No 27.

⁽⁷⁾ European Commission; Danish Technological Institute (2012), [Challenges and trends in continuing development of skills and career development of the European workforce: survey report](#)

⁽⁸⁾ Cedefop, 2010, [Quality in VET in European SMEs](#) A review of the food processing, retail and tourism sectors in Bulgaria, the Czech Republic, Romania and Slovakia. Luxembourg: Publications Office.

⁽⁹⁾ Council of the European Union; European Commission (2010), [The Bruges communiqué](#)

⁽¹⁰⁾ See Footnote 2

good practice and develop guiding principles on the changing roles, competences and professional development of trainers in VET, as indicated in the Bruges Communiqué.

2.1.2. Defining a trainer

There is no unified approach across the countries to defining a trainer in VET. In many countries, there is no distinction between teachers and trainers working in initial VET. As a general trend, teachers usually work in VET schools while trainers operate in the work-based environment (Belgium, Cyprus, Finland, Germany, and Sweden). In most countries with school-based VET, there are teachers of general subjects, teachers of vocational subjects (both theory and practice) and teachers of practical training/trainers. In countries with developed apprenticeship systems, there are also trainers in the workplace (Austria, Denmark, Finland, France, Germany, Hungary, Netherlands, Sweden, and Switzerland).

The situation in continuing VET and adult learning (whenever such distinction is made) is more complex, but nevertheless, in most countries one encounters VET teachers/trainers in school-based contexts (if CVET is provided through VET schools, for example, in Latvia, Lithuania, Poland), full-time in-company trainers, skilled workers performing such training-related functions as induction of new employees to the company and/or training other employees and also external trainers who usually work as freelancers or for training providers.

The current study focuses on in-company trainers of employed adults. For the purpose of the study, there are defined as follows:

- skilled workers who conduct continuing training of co-workers in addition to their regular tasks (as part of their job tasks), including tutoring and mentoring, and/or full-time company employees called trainers (or equivalents); this also refers to owners and managers of SMEs who often ensure the training function themselves.

Trainers working in the context of apprenticeship-type schemes for young people are excluded from the scope of this study.

The in-company learning to be considered in this study is intentional, planned and structured learning activities ensured by enterprise and in enterprise and addressing people in employment. The unemployed are out of scope of this study.

2.1.3. Competences of VET trainers and support to their continuing professional development

Competence requirements to trainers and adult educators are usually formulated in such documents as competence profiles or competence standards. Most recent Cedefop publication, *Trainers in continuing VET: emerging competence profile* (2013)⁽¹¹⁾, examined competence standards and certification, including the

⁽¹¹⁾ Cedefop (2013), [Trainers in continuing VET: emerging competence profile](#), Luxembourg: Publications Office.

validation and recognition of prior learning, of trainers in VET and adult learning that have recently been developed in some countries at national, sectoral and company levels. Many of these developments were accompanied by providing training programmes to ensure the acquisition of the missing competences or updating the existing ones to the required level. However, it is not known to what extent in-company trainers benefit from these. The study should get insights from in-company trainers on this issue.

The analysis of the competence requirements available across countries reveals that in spite of national differences, some common areas of competence can be established and makes it possible to speak about an emerging competence profile of a VET trainer in a workplace environment. Competences are defined at different levels required at different stages in the trainer's career or in different training areas/levels.

At least **four groups of competences** are considered important for in-company trainers ⁽¹²⁾:

- (a) competences related to their specific technical domain, sector;
- (b) competences related to serving the company's strategy and enhancing its competitiveness through training;
- (c) pedagogical/didactical competence, training-related competences;
- (d) transversal competences that help trainers support the learning process.

Competence requirements and accompanying training are more often encountered when training supported by public funding is concerned (initial VET, EU- and nationally-funded programmes and projects) ⁽¹³⁾. On the other hand, training of trainers outside state-funded (national) provision is shaped by employers, sectoral organisations or professional associations of trainers. This kind of training does not lead to state-recognised qualification, sometimes leading to sectoral qualifications, but it undoubtedly contributes to professional development, updating specific skills and competences relevant on the labour market or key competences of trainers. It also includes informal, workplace learning.

Most initiatives tend to focus on developing trainers' pedagogical and transversal competences. However, trainers in companies also need to update and upgrade their skills and competences in the field of their expertise. They should know their company's core business, learning culture and work organisation and be able to support it through identifying skill gaps, learning needs and creating learning-inducing environments. This study should help explore how the development and updating of all groups of competences of in-company trainers are supported.

Previous research showed that the provision of continuing professional development (CPD) for trainers in CVET, especially for in-company trainers, is

⁽¹²⁾ idem

⁽¹³⁾ K. Volmari, S. Helakorpi and R. Frimodt (Eds), (2009), [Competence framework for VET professions: handbook for practitioners](#), Helsinki: Finnish National Board of Education, and Cedefop (2013), [Trainers in continuing VET: emerging competence profile](#). Luxembourg: Publications Office.

fragmented, unregulated, market-driven and provided by a wide variety of private and public institutions. As a result, in-depth information about training in enterprise, even more so on in-company trainers, is scarce and insufficient. Some studies ⁽¹⁴⁾ considered that the lack of data on in-company trainers was a major challenge for identifying effective interventions as regards the development of competences they need while involving in-company trainers and their employers was one of the success factors of such interventions.

The current study is expected to obtain and analyse the views of employers and in-company trainers on the competence needs, opportunities for their development and updating and on possible support mechanisms that can be provided by the state, regional authorities and organisations, sectoral organisations and companies. This will also help to ensure that provided recommendations are relevant to the needs of companies, labour market, trainers and learners (workforce).

2.1.4. Related Cedefop's projects/studies

(a) trainers in VET

- Cedefop (2013). [Trainers in continuing VET: emerging competence profile](#). Luxembourg: Publications Office.
- Cedefop (2010). [Professional development opportunities for in-company trainers: a compilation of good practices](#). Luxembourg: Publications Office. Cedefop working paper; No 6.
- K. Volmari, S. Helakorpi and R. Frimodt (Eds). (2009). http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/560/111332_Competence_framework_for_VET_professions.pdf Helsinki: Finnish National Board of Education.

(b) workplace learning

- Cedefop (2008). [Career development at work](#). Luxembourg: Publications Office.
- Cedefop (2010). [Employer-provided vocational training in Europe: evaluation and interpretation of the third continuing vocational training survey](#). Luxembourg: Publications Office. Cedefop research paper No 2.
- Cedefop (2011). [The impact of vocational education and training on company performance](#). Luxembourg: Publications Office. Cedefop research paper; No 19
- Cedefop (2011). [Learning while working: success stories on workplace learning in Europe](#). Luxembourg: Publications Office.
- Cedefop (2012). [Learning and innovation in enterprises](#). Luxembourg: Publications Office. Cedefop research paper No 27.

(c) labour market outcomes of VET and on VET benefits

⁽¹⁴⁾ European Commission; Institute of Technology and Education (2008), [Eurotrainer: making lifelong learning possible: a study of the situation and qualifications of trainers in Europe](#), Final report, Vol. 1. Bremen: ITB.

- Cedefop (2011). [The economic benefits of VET for individuals](#). Luxembourg: Publications Office of the European Union.
- Cedefop (2011). [Vocational education and training is good for you - The social benefits of VET for individuals](#). Luxembourg: Publications Office of the European Union.

(d) skills mismatch and skills obsolescence

- Cedefop (2012). [Preventing skill obsolescence](#), Briefing Note.
- Cedefop (2012). [Skill mismatch - The role of the enterprise](#). Luxembourg: Publications Office of the European Union.

2.2. General purpose and objectives of the study

The study under this tendering procedure aims to improve the understanding of policies and practice that support the quality of training in enterprises through the development and updating of necessary competences of in-company trainers (see point 2.1.2). It will bring evidence on how enterprises support training of their employees and more specifically, how they identify, nominate/recruit and support trainers in companies and how they develop and upgrade their competences as well as which available options they use to do so and also what support can be provided to enterprises in this respect.

More specifically, the study should result in:

- (a) a thorough review of recent developments of policy and practice in the Member States (EU27) and Croatia ⁽¹⁵⁾ that relate to the competences of in-company trainers at national, regional, and sectoral levels;
- (b) an in-depth analysis of the views of employers and in-company trainers on trainer support mechanisms at national, regional, sectoral and enterprise levels to be collected through specifically designed, piloted and implemented surveys in selected countries and economic sectors;
- (c) an analysis on accessibility, effectiveness and transferability of the measures identified by the study;
- (d) recommendations for policy-makers, employers, in-company trainers and trainers of trainers on how to create better opportunities for equipping in-company trainers with competences to fulfil their changed roles and responsibilities.

The study should combine quantitative and qualitative methodologies and should be based on the analysis of secondary data, taking into account policy documents, statistical information and existing research at European, national and sectoral levels and on the collection and analysis of new data.

2.3. Work packages and tasks

The work under this contract is divided into three work packages (WP).

⁽¹⁵⁾ The country will become the 28th EU member country on 1 July 2013.

2.3.1. Work package 1: an overview of policy and practice in 27 Member States and Croatia

The purpose of WP1 is to conduct a thorough review of recent developments of policy and practice in the Member States (EU27) and Croatia that concern requirements to the competences of in-company trainers and provision of opportunities for developing and updating them.

The contractor shall take into account and include in the analysis the developments and initiatives that have taken place at national, regional, and sectoral levels since 2007. The review should not limit itself to policies and practice that are explicitly and extensively covered by the legislation and research; it should also attempt to gather evidence on approaches used by sectoral organisations, chambers of commerce and industry, groups of companies, professional organisations of trainers, social partners. The review should include requirements to competences and continuing professional development of the training staff that are part of quality assurance mechanisms or of monitoring of training provided in enterprise.

The outcomes of EU-funded (European Social Fund, Lifelong learning programme ⁽¹⁶⁾) projects aimed at training in-company trainers should also be examined as some countries invested considerable amounts of EU funding to training VET teachers and trainers (Lithuania, Slovakia, Poland, Slovenia, Cyprus).

The focus should be on completed measures or measures that are in the implementation stage.

The review should examine:

- (a) whether and how training in enterprises is reflected in the national education and training, labour and enterprise legislation and policies and whether there are any requirements to the qualifications/competences of the staff who provides it;
- (b) whether continuing professional development is an individual right or an obligation of a trainer or part of quality assurance of in-company training;
- (c) what are the main approaches used in the countries to address the competence development of in-company trainers;
- (d) what types of programmes of formal and non-formal professional development are available at all levels and whether the participation of in-company trainers is monitored;
- (e) which communication channels are used to inform in-company trainers of the available opportunities for CPD.

⁽¹⁶⁾ Only large-scale LLP projects (Leonardo da Vinci, transfer of innovation) the outcomes of which have been mainstreamed at national, regional or sectoral level, should be analysed.

The overview should build on desk research and, possibly, field work.

Apart from legislative documents, official statistical data sources, surveys, grey literature and policy documents (education and training, employment and labour) related to national and sectoral infrastructures and provision of learning in enterprise, the following sources are recommended (but not limited to):

- (a) VET in Europe – [Country reports](#) (prepared and updated by ReferNet ⁽¹⁷⁾ consortia, according to a common structure provided by Cedefop);
- (b) relevant Cedefop studies mentioned in Point 2.1.4. and in Bibliography;
- (c) the [Annual report on SMEs](#) and the Small Business implementation country sheets;
- (d) Europe 2020 [country-specific recommendations](#) for action for stability, growth and jobs 2012-2013
- (e) national priorities of the ESF related to learning in enterprises;
- (f) national lifelong learning strategies/policies;
- (g) sectoral policies for skill development;
- (h) Eurostat database for further education and training (CVTS3 and CVTS4);
- (i) European Commission; Institute of Technology and Education (2008). [Eurotrainer: making lifelong learning possible](#): a study of the situation and qualifications of trainers in Europe. Final report, Vol. 1. Bremen: ITB;
- (j) European Commission; Danish Technological Institute (2012). European business forum on vocational training: challenges and trends in continuing development of skills and career development of the European workforce: [survey report](#). Copenhagen: DTI.

As a result of the analysis, an overview of the main developments, trends and challenges will be prepared. Groups of policies and practice as well as common approaches and common challenges by groups of countries/sectors will be identified. Such grouping will further be used to develop policy recommendations, taking into account different policy, VET system and labour market contexts. The identified trends and support mechanisms will also serve as a basis for developing survey instruments for WP2.

2.3.2. Work package 2: Design, piloting and implementing employers' and in-company trainers' surveys. Data analysis.

The purpose of WP 2 is to gather evidence on trainer competence development and support mechanisms at national, regional, sectoral and enterprise levels.

The contractor will develop, pilot and conduct **two surveys** in a sample of companies in selected countries (a minimum of eight countries): **one of employers** and **one of in-company trainers**.

It is up to the contractor to propose the content and structure of the survey instruments (questionnaires) according to the study's aims and objectives.

⁽¹⁷⁾ ReferNet is a network of institutions created by Cedefop in 2002 to provide information on national vocational education and training (VET) systems and policies in the EU Member States, Iceland and Norway.

However, both questionnaires should enable to collect the views of the company managers and trainers and provide insights on the following issues:

- (a) value of training for companies; most frequently used ways of providing training to company employees; recruiting/nominating practices for in-company trainers;
- (b) characteristics of in-company trainers (qualifications, employment, tasks, affiliation);
- (c) competence portrait of in-company trainers (existing competences, competence gaps, competences that have not been identified so far as necessary ⁽¹⁸⁾);
- (d) relative importance of competences and learning needs to the employers and trainers;
- (e) provision of support to trainers in enterprise and awareness of external options (attitudes, typical practice, areas and competences addressed, roles), opportunities for developing new competences and updating the existing ones (existing and used options, desirable options);
- (f) needs and challenges (adequacy, barriers, anticipated changes);
- (g) support that the employers and trainers receive and would like to receive from external bodies, including the state, chambers of industry and trade, professional organisations, etc.

The contractor will carry out the following:

- (a) design two comparable questionnaires, one for owners/managers/HR managers and one for in-company trainers;
- (b) pilot the questionnaires in a small number of interviews (face to face interviews) and revise them, if needed;
- (c) identify companies and carry out the surveys on the approved sample of companies.

The surveys can be conducted face-to-face, by telephone, online. The interviews should be conducted in the native language of the interviewees and by means most appropriate to the interviewees.

- (d) analyse the results and draw conclusions.

The tenderer should propose and duly justify in the Technical proposal (see point 5.1) the selection of countries and sectors as well as propose an estimated number of companies to be surveyed.

The surveys will be conducted in a minimum of **8 (eight) countries** (EU27 and/or Croatia), representing different parts of Europe; specific characteristics of VET systems; labour market policies; different approaches and recent developments

⁽¹⁸⁾ For information on competence profiles and frameworks use as a basis Cedefop (2013). Trainers in continuing VET: emerging competence profile. Luxembourg: Publications Office and other sources mentioned in points 2.1.4 and 2.3.1.

in the field of CVET and development of trainers; requirements and differences, if any, between trainers and teachers. At least 2 big countries should be represented.

The selected companies should represent at least **4 (four) economic sectors**. The tenderer may select from training intensive sectors that:

- are important for economic recovery and growth in Europe,
- are expected to face emerging and replacement skill needs,
- are affected by rapid technological changes and growing importance of transversal skills ⁽¹⁹⁾,
- have different labour market features,
- can ensure the maximum policy relevance of the study to the Rethinking education ⁽²⁰⁾ and the [Employment package](#).

The **expected number of companies** to be surveyed is **300** (a minimum of 50 companies in big countries and 30 companies in other countries) in a minimum of 8 countries and at least in 4 sectors: the estimated number of interviews is 600. All companies should be [SMEs](#).

In **each** selected company, **both surveys** will be conducted: **an owner/managers/training manager/HR manager** and **at least one trainer** (for the purpose of the study, a trainer is an employee who trains other employees and/or apprentices full-time or as part of his/her job) **should be interviewed**.

The final list of companies identified and selected for the survey and the final questionnaires to be used in the survey will have to be agreed and approved by Cedefop. The proposed work plan should foresee enough time for possible adaptation and changes in the questionnaire before the final approval.

2.3.3. Work package 3: Developing messages and recommendations for VET and labour policies and practice

The aim of WP 3 is to develop relevant messages and recommendations for VET and labour policies and practice. Based on the findings of the literature review and the results of the survey of companies, the tenderer should draw key messages and propose recommendations to policy-makers and other stakeholders on how to ensure that in-company trainers have the necessary competences for providing high quality learning in enterprise. Critical success factors as well as challenges and trends should be identified.

2.3.4. Networking with national experts and stakeholders

Considering the complexity of the topic, to conduct, manage and ensure high quality results, prospective contractors are advised to rely on a team (network) of

⁽¹⁹⁾ For more information, please consult Cedefop's work and other sources mentioned in points 2.1.4 and 2.3.1.

⁽²⁰⁾ European Commission (2012), [Rethinking education: Investing in skills for better socio-economic outcomes](#), Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM(2012) 669 final.

experts (consortia) across different countries to enable carrying out country context analysis, validating the findings of desk research, identifying and reaching the companies to be surveyed and ensuring the interviews in the national languages of the countries.

All involved organisations and partners in the countries proposed for the surveys should be clearly indicated in the Technical proposal (see point 5.1).

2.4. Deliverables and timetable

The Contractor should submit to Cedefop the following reports in English:

- (a) an inception report: within 1 month of the signature of the contract.

The inception report will fine-tune the methodology proposed in the tender, finalise the proposed sectors and countries for the surveys, describe ways of reaching companies, a proposal for questionnaires, and an updated work plan and timetable. It should also address the challenges and issues identified. Cedefop will provide feedback on the inception report, which the Contractor will have to address in close cooperation with Cedefop's designated expert.

- (b) a first draft overview of policy and practice in 27 Member States and Croatia as regards requirements to the competences of in-company trainers (including quality assurance and monitoring of training in enterprises) and provision of opportunities for developing and updating them (WP1): within 4 months of the signature of the contract. The overview will include the findings from desk research. The in-depth interviews with stakeholders will not be included in this deliverable.

- (c) an interim report: within 7 months of the signature of the contract (draft) and within 9 months (final);

The interim report will include:

- a complete overview of the situation and developments in the 27 Member States and Croatia as regards the requirements and support to in-company training and trainer competences and provision of continuing professional development to trainers at all levels. National examples should be embedded in the text and properly referenced;
- In-depth descriptions of the situation in the countries selected for the company surveys;
- the description of the methodology, including the final versions of the questionnaires and analytical framework;
- brief report on the progress of the survey and discussion of major challenges encountered, solutions found and/or proposed, potential impact on the preparation of the final report;
- a proposed outline of the final report.

- (d) a final report: within 10 months of the signature of the contract (draft) and within 12 months of the signature of the contract (final).

The final report will include all results, findings and deliverables of WP1, 2, and 3.

The following elements will be included (but not limited to):

- executive summary highlighting main findings and recommendations;
- description of methodology and analytical model;
- results of the survey, including in-depth descriptions of the situation in the countries selected for the company surveys;
- presentation and discussion of findings;
- conclusions;
- key messages and recommendations for policy-makers and other stakeholders;
- annexes including:
 - the questionnaires used in WP2;
 - bibliography;
 - statistical sources used;
 - list of abbreviations;
 - glossary of main terms;
 - full set of data and other relevant information.

Cedefop reserves the right to ask for any background data, evidence of computations and the quantitative models used in the analysis carried out by the Contractor. Cedefop will provide comments on the draft final report. The Contractor will address those comments, in close collaboration with Cedefop's designated expert.

The contractor shall submit all deliverables in English, in hard copy and electronic format. Figures and tables should be delivered in Excel or in Word, as appropriate. Excel charts should include the data tables that allow modifying or reproducing the charts, if needed. The full data set of the interviewed should also be submitted in an agreed electronic format (Excel, Access, SPSS or other). The electronic versions should fully correspond to the hard copies.

The Contractor shall ensure that all reports submitted to Cedefop have been subject to professional proof-reading and editing in English. The cost for this should be included in the Financial proposal (Table in point 5.4., item 2c). Layout and formatting should follow the Cedefop style manual (see Annex K of the Tender dossier).

2.5. Meeting and travel expenses

The contractor (up to 2 persons) will be required to attend three one day meetings with the responsible expert at Cedefop, Thessaloniki, Greece:

- (a) a kick-off meeting - 3-4 weeks after the signature of the contract - to fine-tune the methodology, proposed approach, data sources to be used, final planning to be presented in the inception report;
- (b) a meeting to discuss a first draft overview of policy and practice in 27 Member States and Croatia as regards requirements to the competences of in-company trainers (including quality assurance and monitoring of training in enterprises) and provision of opportunities for developing and

updating them (Deliverable (b)) and to discuss the preliminary design of the survey tools for WP 2 and analytical model and outline of final report – within 1 month after submission of Deliverable (b), approximately 5th month of the contract execution;

- (c) a meeting to discuss and exchange views on the findings from the questionnaire analysis and on key policy messages and recommendations to stakeholders to be included in the final report – within 1 month after submission of a draft final report.

All costs incurred in relation to these meetings, including travel and accommodation, as well as to performing the tasks described in the Technical specifications have to be included in the Financial proposal (point 5.4. and Annex H, items 2a and 2b in the Price schedule table).

For quality assurance and/or validation and dissemination, Cedefop can decide to organise a workshop. The contractor may be asked to contribute this event, which will be reimbursed by Cedefop according to its relevant rules (see Annex IV of the Draft Contract in Annex B).

Any extra travel expenses, besides those mentioned above, that might be needed to perform the tasks under this contract, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its rules (see Annex IV of the Draft Contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

Participation to this tender procedure is only open to tenderers who are in a position to subscribe in full to the Declaration of honour with respect to the exclusion criteria and absence of conflict of interest, given in Annex C. Therefore, all tenderers, all group (consortium) members (if any) and all subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) must provide this declaration, duly signed and dated. The exclusion criteria will be assessed in relation to each entity 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 presenting signed statements from those entities who agree to place their resources at his disposal for the purpose of the tender. 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.

Requirements:

- The tenderer should have an average annual turnover of at least 200 000 € for the last two financial years concerning services in research and comparative analysis on vocational education and training policies and provision in the Member States and at European level, on developing competences and skills for the labour market, company/employer surveys, or impact assessment surveys of beneficiaries of education and training programmes

Proof of economic and financial capacity

To prove the economic and financial capacity, the tenderer(s) must provide a **signed statement of the turnover** for the last 2 (two) financial years concerning the type of services as mentioned under 'Requirements' above (**Please fill-in and sign Questionnaire 2 of Annex G**).

In case of a consortium (grouping) or subcontracting, **each member of the consortium and all sub-contractors** (identified in line with points 4.1 or 4.2 below) must provide the required statement of the economic and financial capacity (**Questionnaire 2 of Annex G**), but the assessment of whether the 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 (a single tenderer or 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 from the subcontractors. For tenderers or sub-contractors (identified as per any of the two bullet-points in paragraph 4 of Point 4.2 below) who are natural persons/freelancers, a tax declaration and tax clearance statement for the last two financial years will be requested.

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, they will be required to justify the non-provision and may prove their 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(s) must have performed at least 3 (three) contracts in the last 3 (three) years in the field of research and comparative analysis on vocational education and training policies and provision in the Member States and at European level, on developing competences and skills for the labour market, company/employer surveys, or impact assessment surveys of beneficiaries of education and training programmes.
- The Tenderer's **KEY** experts, whose involvement will be instrumental for the implementation of the contract, must have the knowledge and experience relevant to the subject of the contract for its successful

implementation. In particular, the team must comply with the following minimum requirements:

Team leader(s)/Project Manager	• University degree; • at least 8 (eight) years of experience in research and analysis on education and training policies and/or lifelong learning; • at least 5 (five) years of experience in international research project management; • linguistic ability to communicate and draft to a high standard in English (C2 or equivalent)²¹.
Senior expert 1 (at least 1 member)	• University degree; • at least 5 (five) years of experience in research and comparative analysis on vocational education and training and lifelong learning; • at least 3 years in one of the following: • <i>competence assessment and/or development, qualifications;</i> • <i>continuing professional development of teaching/training professionals;</i> • linguistic ability to communicate and draft to a high standard in English (C2 or equivalent).
Senior expert 2 (at least 1 member)	• University degree; • at least 5 (five) years of experience in designing, organising and conducting interviews and questionnaire surveys in the training or labour market context; • linguistic ability to communicate and draft to a high standard in English (C2 or equivalent).
Junior Expert(s) 1	• University degree; • at least 2 (two) years of experience in research on labour market and/or education and training policies; • linguistic ability to communicate and draft to a high standard in English (C1 or equivalent).
Junior Expert(s) 2	• University degree; • at least 2 (two) years of experience in empirical data collection in social science contexts, development, design and implementation of surveys; • linguistic ability to communicate and draft to a high

²¹ All required levels of languages are determined in "Language levels of the [Common European Framework of Reference \(CEF\)](#) or equivalent.

	standard in English (C1 or equivalent).
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Proof/Evidence of the technical and professional capacity

The tenderer must present the following documents or information to prove their technical and professional capacity to perform the proposed contract:

- a brief presentation of the tenderer(s), covering all consortium members and/or subcontractors, if any, summarising the required experience and its relevance to the tasks covered by this contract (**please fill and sign Questionnaire 4 in Annex G**);
- a list of contracts performed in the past 3 (three) years in the above required fields. The list should describe the contracting authorities, the subjects, the amounts (for informative purposes), the dates, the percentage and the specific tasks performed by the tenderer (**please fill and sign Questionnaire 3 in Annex G**);
- a brief description of the composition of the team and roles of key experts;

Name	Institution	Role in the team	Relevant expertise (briefly)

- detailed CVs of all the proposed team of key experts. The Europass CV format (<http://europass.cedefop.europa.eu>) or similar shall be used. The provided CVs should provide clear and sufficient information as regards the expertise and experience of the experts in the required fields and their linguistic capacity in English.

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

3.3. Legal Position

Tenderers may choose between introducing a bid as a single tenderer or submitting a joint offer (see point 4.1) as a grouping (consortium), in both cases with the possibility of having one or several subcontractors (see point 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form. .

The Legal Entity Form should be completed and signed by the representative(s) of the tenderer authorised to sign contracts with third parties.

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

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 (Liechtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, the former Yugoslav Republic of Macedonia, 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/ Grouping (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 grouping 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 grouping (consortium) will have an equal standing towards Cedefop in executing it.

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

Tenders submitted by groupings (consortia) must specify the role, qualifications and experience of each member or of the grouping (consortium) **(please fill the Questionnaires in Annex G).**

Each member of the grouping (consortium) must provide the required evidence for the exclusion and selection criteria (see points 3.1. and 3.2.). Concerning the selection criteria, the evidence provided by each member of the grouping (consortium) will be assessed to ensure that the grouping (consortium) as a whole meets 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 models 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, **model 1** (in **Annex I**) should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by each member.
- For groupings with a legal entity in place, **model 2 (in Annex I)** and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment to 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 max. 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 Questionnaire 1 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:

1. the Declaration of honour with respect to the exclusion criteria and absence of conflict of interest (**Annex C**) filled-in and signed by each subcontractor;
2. the required documents to prove the economic/financial and technical/professional capacity of each subcontractor as described in points 3.2.1 and 3.2.2;
3. a letter of intent (**see the form in Annex J**) duly filled-in and signed by each subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. The letter will also state the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the 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) together fulfil the criteria.

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:

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

whereby:

TQV = Total Quality Value of the tender (as per points 5.1 and 5.2);

TFO = Total Financial Offer of the tender (as per points 5.3 and 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 award (evaluation) criterion and in total a minimum of **65** (sixty-five) out of 100 points (TQV) in the technical evaluation – see below).

5.1. Technical proposal

The tenderer's technical proposal should provide a clear and comprehensive response to all requirements as set out in the Terms of Reference in point 2 above and describe **clearly** and **in detail** the services proposed for performance of the contract.

To facilitate the evaluation of tenders against the technical award criteria (see point 5.2.), it is advised that the tenderers organise their technical proposal according (but not limited) to the following scheme:

- (a) Summary of the proposal, highlighting its key aspects, main strengths and innovativeness.
- (b) Rationale of the project (Award criterion 1):
 - A concise discussion on the subject, demonstrating in-depth understanding and reflection on the importance of the topic, namely, support to continuing professional development of trainer competences in enterprise, an analysis of the main policy documents and findings from research literature on the topic, key challenges as well as on how support to continuing professional development of in-company trainers can bring about important labour market and economic outcomes and the implications for policy;
 - key issues that affect the achievement of the expected outcomes.
- (c) Methodology, key activities and main issues by work package (Award criterion 2):
 - Description of the conceptual and methodological approach to the assignment, including main steps, research questions, potential data and information sources, terminology used, etc.; (2.1)
 - Description of the methodological approach to implementing the surveys, approach to developing questionnaires, potential outline of questionnaires, who will conduct the survey, ensuring validity and reliability of instruments and data. (2.2)
 - Description of the sampling scheme: the proposed selection of countries and sectors with detailed explanation of the rationale, the approach and possible criteria to identifying the companies in the selected countries (for more detail see point 2.3.3. of the Terms of reference), the total number of companies to be surveyed (2.3).

For WP 2, the tenderer(s) should provide a proposal for the selection of countries and sectors, in which a company survey will be conducted with detailed rationale supporting the choice. They should also present their networking opportunities in the selected countries and access to data.

- Assessment of risks and research challenges and quality assurance measures planned.(2.4)

(d) Detailed work plan (Award criterion 3), including:

- project management, work organisation, distribution of tasks and responsibilities among the experts/members of the consortia/subcontractors (please ensure compatibility with, but further elaborate on, the relevant information provided in response to the relevant requirement on p. 24); (3.1)
- timetable and deliverables. (3.2)

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.

The tenderer shall identify a project manager within their organisation who will represent the single contact point for all administrative and operational communication in regard to the contract implementation. As appropriate, the team leader (see 3.2.2.) can also act as project manager or two different persons can be identified. Cedefop will also designate a contact person in charge of handling the contact with the selected tenderer.

5.2. Technical evaluation

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

The evaluation will be carried out on the basis of the following technical award criteria:

Award criteria	Maximum number of points
<u>Award criterion 1</u> – The level of understanding of the assignment, its nature, context and expected outcomes	20
1.1. The tenderer(s) should demonstrate the understanding of the important role of trainers in enterprises in expanding and increasing the quality of learning at the workplace/in enterprise, in ensuring that workforce have the right mix of skills for company productivity and innovation and for lifelong learning, of the existing competence requirements and support mechanisms for professional development of trainers, key challenges and policy implications. The tenderer should reflect on key issues that can affect the achievement of the expected outcomes.	20
<u>Award criterion 2</u> – The quality and appropriateness of the methods and approaches suggested to carry out the tasks under the assignment	60
2.1. Relevance of the approach to preparing an overview of the situation with continuing professional development of in-company trainers in the Member States and Croatia: key issues to explore, sources of information, access to information at national level.	10
2.2. Relevance of the proposed strategy to designing, piloting and implementing two surveys of employers and trainers in companies: key issues, envisaged steps, proposed outline, data collection and analysis strategies, approach to recruiting the sample, proposed number of companies to be interviewed, identification and approaching the companies, ideas for the analytical model, and other.	25
2.3. Soundness and appropriateness of the rationale for the selection of countries, sectors and companies for the two surveys (WP2).	15
2.4. The level of understanding of risks and research challenges related to the implementation of the tasks and quality assurance measures proposed.	10
<u>Award criterion 3</u> – The organisation and management arrangements	20
3.1. Appropriateness of the allocation of tasks, type and degree of involvement of the proposed experts/human resources, including the way of coordination of national partners/contact points in carrying out the survey in the selected countries; access to data.	10
3.2. Clarity, coherence and feasibility of the work programme and timetable.	10
Overall total score (Total Quality Value -TQV)	100

In order to guarantee a minimum threshold of quality, only the proposals that after the technical evaluation:

- reach a minimum of 50% of the possible score for each of the award criteria 1, 2 and 3, and
- obtain an Overall Total Quality value score of 65 (sixty-five) points and more

will be subject to the financial evaluation (see point 5.3).

5.3. Financial evaluation

Only tenders scoring in total **65 (sixty-five)** points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered in the Price schedule table (see point 5.4 and Annex H).

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

$$\text{Financial score} = (\text{cheapest Total Price} / \text{Total Price of the tender considered}) * Y.$$

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

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in EURO and include all expenses.
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.

5.4. Financial Proposal

The Financial Proposal must be clear and in compliance with the tender specifications. It should indicate the total price for carrying out all the activities indicated in the Terms of Reference. The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5). All services that shall be procured should be included.

The tenderers must fill-in the Price schedule table in Annex H and present a detailed breakdown of the price offered.

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, signed by the person/s (name and position) who is/are authorised to sign the contract in case of contract award
- the declaration of honour with respect to the exclusion criteria and absence of conflict of interest requested in point 3.1 (a standard template found in Annex C);
- documents as required in points 3.2, 4.1, 4.2 to meet the selection criteria;
- Questionnaires 1 – 4 as found in Annex G duly filled and signed;
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I;
- 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 subcontractors, Envelope A should also contain all relevant documentation as requested in points 4.1 and 4.2 respectively (with reference to points 3.1, 3.2 and 3.3).

6.2. Envelope B – Technical proposal

One signed original and three copies of:

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

6.3. Envelope C – Financial proposal

One signed original of the Financial Proposal containing all information requested in point 5.4 and Annex H.

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

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

(Given as a separate file in *.doc format)

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

and completed and signed by an authorised representative of the tenderer (group leader in case of consortium, with indication of entity, 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

(Given as a separate file in *.doc format)

ANNEX G

Questionnaires 1- 4

(Given as a separate file in *.doc format)

ANNEX H

FINANCIAL PROPOSAL

(Given as a separate file in *.doc format)

ANNEX I

Models of power of attorney

(Given as a separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as a separate file in *.doc format)

ANNEX K

CEDEFOP STYLE MANUAL

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