

FINANCE AND PROCUREMENT

DRS/PRO/YSIRAK/RB(2016)01549
Thessaloniki, 18 July 2016

OPEN INVITATION TO TENDER

Title : *Supporting Thematic Country Reviews (TCRs) on Apprenticeships and Flash Thematic Country Reviews (Flash TCRs) on Apprenticeships*

AO/DLE/TCRs and flash TCRs on Apprenticeships/008/16

REFERENCE: *contract notice OJ- 2016/S 136-243990 of 16 July 2016*

Dear Sir/Madam,

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

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

1. Tenders (and documents included in them) should be submitted preferably in English, but in any case in one (or in any) of the official languages of the European Union.
2. Tenders may be submitted exclusively in one of the following ways:

(a) by post to be dispatched **not later than the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch on the postmark or the date of the deposit slip, to the following post address of Cedefop :

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

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),
Attention of Procurement Service
123, Europe Str,
GR-57001 Thessaloniki-Pylea, Greece
Tel: +30 2310 490111 / 490 064**

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

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

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

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

The **inner envelope**, addressed to the Procurement Service 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 <i>CEDEFOP No: AO/DLE/TCRs and flash TCRs on Apprenticeships/008/16</i> “Supporting TCRs and Flash TCRs on Apprenticeships” Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE
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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 section 6 of the attached Tender Specifications.

Tenderers should not disclose their financial offer in any part of their tender other than the sealed envelope C, not even disclose the total amount of their financial offer on the cover letter.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
5. **Submission of a tender implies acceptance of all the terms and conditions set out in this Invitation to Tender, in the specifications and in the draft contract and**, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract. Therefore, It is mandatory to include in the offer a **Cover Letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
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 maximum two representatives. The names of the persons 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 three working days prior to the opening session. Failing that, Cedefop reserves the right to refuse access to its premises.
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.

Before requesting any additional information, the tenderers are kindly requested to visit the FAQ page on Cedefop website:

<http://www.cedefop.europa.eu/en/about-cedefop/faqs/procurement-procedures> .

- 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/about-cedefop/public-procurement>.) **Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

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

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.
- Tenderers are not allowed to amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	<i>25 August 2016</i>	17.00h
Last date on which clarifications are issued by Cedefop	<i>30 August 2016</i>	N/A
Deadline for submission of tenders (hand delivered)	<i>06 September 2016</i>	17.00h
Deadline for submission of tenders by post / courier	<i>06 September 2016</i>	N/A
Validity of the tenders	<i>19 September 2016</i>	N/A
Tender opening session	<i>06 March 2017</i>	11.00h
Estimated contract signature date	<i>December 2016</i>	

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 for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.
11. Up to the point of signature, the contracting authority (i.e. Cedefop) 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 an Order or Specific Contract under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
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 may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on
http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE).
15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.

¹ Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002 (OJ L 298 of 26.10.2012, p. 1) as amended.

16. You will be informed of the outcome of this procurement procedure by e-mail only. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Yours sincerely,

Isabelle Thomas-Kollias
Acting Head of Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DLE/TCRs and flash TCRs on Apprenticeships/008/16

**Supporting Thematic Country Reviews (TCRs) on Apprenticeships and Flash
Thematic Country Reviews (flash TCRs) on Apprenticeships**

Tender Specifications

Table of contents

Introduction to Cedefop: Europe's agency for training policy	9
1. Overview of this tender procedure.....	11
1.1. Description and type of the contract	11
1.2. Place of delivery or performance	12
1.3. Division into lots	12
1.4. Variants.....	12
1.5. Value or quantity of purchase	12
1.6. Duration of the contract	12
1.7. Main terms of financing and payment.....	13
2. Terms of Reference	14
2.1. Background information	14
2.2. Description of the assignments	14
2.3. Requested services and tasks for THEMATIC COUNTRY REVIEWS (order forms a and b as per paragraph 1.5)	16
2.4. Requested services and tasks for FLASH THEMATIC COUNTRY REVIEWS (order forms c and d as per paragraph 1.5).....	23
2.5. Requested services and tasks for policy learning and dissemination event (order form e as per paragraph 1.5)	25
2.6. Reports	26
2.7. Meeting and Travel Expenses for TCRs and flash TCRs (order forms a), b), c) and d), as per paragraph 1.5)	27
3. Specific information concerning participation to this tender procedure	30
3.1. Exclusion Criteria	30
3.2. Selection criteria.....	30
3.2.1. Economic and Financial capacity.....	30
3.2.2. Technical and professional capacity	31
3.3. Legal Position.....	33
4. Additional information concerning participation to this tender procedure	35
4.1. Joint Offers/ Groupings (Consortia)	35
4.2. Subcontracting/Subcontractors	36
5. Award of the contract	38
5.1. Technical evaluation.....	38
5.2. Technical proposal	39
5.3.1. Evaluation of abnormally low prices.....	41
5.3.2. Financially unacceptable tenders.....	42
5.4. Financial Proposal.....	42
6. Information on presentation and content of tender	44

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on honour on exclusion criteria and selection criteria
Annex D:	Legal Entity Form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Questionnaires 1 - 6
Annex H:	Financial Proposal
Annex I:	Power of Attorney (Models 1 and 2)
Annex J:	Model of Letter of Intent for Subcontractor/s
Annex K:	Cedefop Style Manual

Introduction to Cedefop: Europe's agency for training policy

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

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

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽²⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

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

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

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

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

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness. New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

⁽²⁾ Cedefop also works with Iceland and Norway.

- **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 finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal 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.

In addition to its web portal www.cedefop.europa.eu, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and Twitter at www.twitter.com/cedefop.

1. OVERVIEW OF THIS TENDER PROCEDURE

In submitting their tender in response to this tender 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 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 a Financial Proposal 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 Thematic Country Reviews (TCRs) on Apprenticeships and Flash Thematic Country Reviews on Apprenticeships (Flash TCRs)”

b) Short description of content of this contract:

The scope of this Framework Contract falls under the Agency's activity on **supporting countries in setting up or modernising or improving the quality of their apprenticeship systems/schemes through country specific reviews**. The services to be provided to Cedefop are threefold:

- a TCR on apprenticeships in two countries, which voluntarily expressed their interest in undergoing the review: Croatia and Cyprus;
- a flash TCR on apprenticeships in two countries identified by Cedefop: Belgium and Sweden;
- to organise a policy-learning and dissemination event.

The selected contractor will assist Cedefop's team in the data collection and analysis to:

- For the TCRs, develop recommendations on what and how to improve, starting from the priority areas identified by the countries;
- For the flash TCRs, identify good practices and formulate country specific solutions.

c) Type of contract: Framework Service Contract.

d) Framework Service Contract whereby the services will be provided following the signature of Order forms throughout its validity. The number and content of Order Forms / Specific Contracts will depend on the needs of Cedefop.

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 EUR 330,000 (without VAT) over a 36 months period. Tenderers should be aware that the information on volume is purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms that will be issued after the Framework Contract is signed may not reach the a.m. estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Orders Forms.

Cedefop will conclude a single framework contract, which will be implemented with 5 order forms, each one related to a different work assignment, one for each of the four countries and one common to all countries.

The following estimated budget is foreseen for each order form:

- (a) Order form for the work assignment for TCR in Croatia – approx. EUR 100,000.00
- (b) Order form for the work assignment for TCR in Cyprus – approx. EUR 85,000.00
- (c) Order form for the work assignment for flash TCR in Belgium – approx. EUR 70,000.00
- (d) Order form for the work assignment for flash TCR in Sweden – approx. EUR 60,000.00
- (e) Order form for the work assignment for the policy-learning and dissemination event – approx. EUR 15,000.00

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1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, shall have initial duration of *two (2) years* and will be automatically renewed up to one (1) time, for an additional period of one (1) year, covering a total acquisition period of three (3) years (2+1).

The order forms that will be signed throughout the duration of the framework contract are expected to have the following duration:

- For the work assignments related to the TCRs in Cyprus and Croatia – about 18 months each;
- For the work assignments related to the flash TCRs in Belgium and Sweden – about 10 months each;
- For the work assignment related to the policy-learning and dissemination event – for 6 months.

1.7. Main terms of financing and payment

For each Order Form related to the work assignments for the Thematic Country Reviews three payments are foreseen and will be made as follows:

- **First Interim payment:** 30% after submission of the first progress report.
- **Second Interim payment:** 40% after submission of the second progress report.
- **Final payment:** 30% after submission of the final activity report.

For each Order Form related to the work assignments for the Flash Thematic Country Reviews two payments are foreseen and will be made as follows:

- **First Interim payment:** 20% after submission of the inception report.
- **Final payment:** 80% after submission of the final report

For the Order Form related to work assignment for the policy-learning and dissemination event **one payment** is foreseen. The payment will be made after participation to the policy-learning and dissemination event and submission of the short report about its outcomes.

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

For further details please refer to the draft contract (Annex B).

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2. TERMS OF REFERENCE

2.1. Background information

Apprenticeships are regarded as an important part of countries' vocational education and training policies, and their benefits are of interest both at the policy and at the scientific level. The interest of policy makers for "apprenticeships" is witnessed by the plentiful reforms of apprenticeships recently promoted by governments in several EU Member States. Cedefop's monitoring exercise shows that about two thirds of the EU countries expressed an interest in apprenticeships as a policy area currently being addressed or for which new policy measures are planned until 2020.

Alongside the interest at political level, the European, international and national institutions have recently produced a number of studies and activities to provide a wider knowledge basis about apprenticeships in the Member States.

Since the existing evidence does not always favour apprenticeship schemes, though, and considering the Member States' continuous and growing interest in such policy, it is imperative to understand which features of the many possible configurations of "apprenticeships" work vis-à-vis specific policy challenges. Thus, it is relevant to provide countries with targeted support to implement the apprenticeship reforms adopted or help them reform the systems, by focussing on the widely diversified country-specific priorities.

In this connection, and in line with the EU policies, Cedefop supports cooperation at European level, among Member States (MS), and interacts with individual countries that wish to foster the development of quality apprenticeships. Such efforts do take into account the diversity of schemes that countries promote under the umbrella of "apprenticeships" policies and the varieties of policy challenges they aim to achieve.

2.2. Description of the assignments

2.2.1. Overall objectives of the assignments

In 2014, Cedefop started cooperating with the Member States to undertake in-depth reviews of their national developments on apprenticeships. Since May 2014 Cedefop has worked on five "Thematic Country Reviews" (TCRs) on apprenticeships in volunteer countries, two piloted and completed (Malta and Lithuania), and three countries that are still running the review exercise (Greece, Italy and Slovenia).

This open invitation to tender is for two new TCRs in Croatia and Cyprus, which expressed their interest in undergoing the review. The main objectives of the TCRs are as follows:

- (a) at **national** level, in close cooperation with Cedefop and the national stakeholders, to carry out in-depth review of apprenticeships in two countries to identify their specific strengths and challenges and present a set of policy recommendations for ensuring quality apprenticeships and support reforms;
- (b) at the **European** level, to increase the evidence base which can support policy- and decision-makers in European countries at different levels in designing and implementing policies and measures for developing and/or improving quality apprenticeships; and also to support comparison across countries.

In addition to the TCRs, starting from 2017, Cedefop will pilot two “flash Thematic Country Reviews” (flash TCRs) in two countries selected by Cedefop: Belgium and Sweden³. With the flash TCRs, Cedefop intends to provide insights on specific aspects of their apprenticeship systems. Accordingly, this open invitation to tender is for two flash Thematic Country Reviews on apprenticeships, whose main objectives are:

- (a) at **national** level, in close cooperation with Cedefop, to carry out a short, focused and in-depth review, based on the area(s) of analysis selected by Cedefop, of the strengths and weaknesses of specific aspects of apprenticeship systems, resulting in examples of policy- or practice-oriented solutions to tackle the recognized weaknesses and/or identification of good practices;
- (b) at the **European** level, to increase the evidence base which can support policy- and decision-makers in European countries at different levels in designing and implementing policies and measures for developing and/or improving quality apprenticeships; and also to support comparison across countries.

With findings from each country participating in the project, the TCRs and flash TCRs will contribute to expand the knowledge on apprenticeship across Europe and to enrich it with a higher level of details, including suggestions for factors determining or hampering success of apprenticeship initiatives in different national contexts.

2.2.2. Subject and scope of the work

Although apprenticeships are relatively well defined compared to other forms of work-based learning, the ways they are understood and implemented vary considerably across different national contexts. For their purpose, the TCRs and flash TCRs will consider apprenticeships to be set-up and/or improved, which have the following distinguishing features:

- (a) They include systematic long-term training alternating periods at the workplace and in an education and training institution or training centre;
- (b) An employer assumes the responsibility for the company-based part of the programme leading to a qualification;
- (c) An apprentice is contractually linked to the employer and receives remuneration (wage or allowance).

While the overall thematic focus of the project is apprenticeships as defined above, the TCRs and flash TCRs need to be country-specific. Setting-up or improving apprenticeships may raise a wide array of policy challenges, such as cost-benefit, governance, quality assurance, curricula, occupational profiles, recognition and certification, career guidance, partnerships, etc. Identifying specific national key policy challenges as a focus of the analysis and evaluation is critical for reaching meaningful results for policy recommendations within the countries and within the project timeframe.

Two countries have expressed interest in participating in Cedefop’s TCRs on apprenticeships in 2017-2018: **Croatia and Cyprus**.

Two countries have been selected by Cedefop for the flash TCRs on apprenticeships, on the basis of a first mapping of apprenticeship schemes in the EU plus Norway and Iceland: **Belgium and Sweden**.

³ Cedefop and the contractor may decide in agreement to select different countries in case unforeseeable circumstances will make impossible to carry out the study in Belgium and/or Sweden.

The TCR is a country-owned and country-driven review process of the apprenticeship system, based on the close collaboration between Cedefop and the Ministry responsible for apprenticeships. It is carried out through an interactive and collaborative process with a Steering Group of national stakeholders, endorsed with a formal mandate, and it results in suggestions for policy recommendations.

The flash TCR is an independent and shorter review process, steered and managed by Cedefop, which focuses on pre-selected aspects of the apprenticeship system. It results in the identification of good practices and/or examples of policy- or practice-oriented solutions, on the basis of a short, focused and in-depth analysis of the strengths and weaknesses of specific aspects of apprenticeship systems reflecting the opinions of the national stakeholders. A policy-learning and dissemination event will be organised with countries that have undertaken, are, and will be carrying out Cedefop's TCRs and flash TCRs on apprenticeships.

The services under the framework contract shall support Cedefop in conducting reviews in these countries.

2.3. Requested services and tasks for THEMATIC COUNTRY REVIEWS (ORDER FORMS a AND b AS PER PARAGRAPH 1.5)

2.3.1. Methodology

The methodology resulting from the concluded and running TCRs exercises will be applied in the two countries, which voluntarily expressed their interest in undergoing the review, namely Croatia and Cyprus, within the current framework contract.

The review methodology relies on:

- (a) a common analytical framework;
- (b) an inclusive, participatory and collaborative approach and policy learning; and
- (c) an evolving and iterative approach.

A. *The common analytical framework.* It includes some characteristic features that are present to a different extent and in different combinations in the existing systems of apprenticeships. The framework does not represent a single model to follow but is rather based on a variety of systems that are considered to be the reference functional model of apprenticeships. The features have a purely operational function and are in no way to be interpreted as “necessary conditions”. The framework is not an exhaustive list either; it may evolve as the review progresses. The analytical framework comprises the following 11 areas that are further translated into more detailed explanatory statements:

Areas of analysis	Operational descriptors
(1) Distinguishing features	(1) Systematic long-term training alternating periods at the workplace and in an education and training institution or training centre that leads to a qualification.
	(2) An apprentice is contractually linked to the employer and receives remuneration (wage).
	(3) An employer is responsible for the company-based part of the programme.

Areas of analysis	Operational descriptors
(2) Place in the ET system	(1) Apprenticeship is defined and regulated in a legal framework.
	(2) Position of apprenticeship in relation to other learning paths is clear.
	(3) Apprenticeship offers both horizontal and vertical pathways to further specialisation or education at all levels.
(3) Governance structures	(1) Roles and responsibilities of the key players (the State, employers' organisations, trade unions, chambers, , schools, VET providers, companies) at national, regional, local levels are clearly defined and distributed: decision-making, implementation, advisory, control.
	(2) Employer organisations and trade unions are actively engaged at all levels.
	(3) Employers' organisations, trade unions, and companies understand and recognise the importance of apprenticeship to a skilled labour force (i.e. social responsibility).
	(4) One coordination and decision-making body is nominated.
(4) Training content and learning outcomes	(1) Qualification standards and/or occupational profiles exist, are based on learning outcomes and are regularly evaluated and updated.
	(2) Curricula and programmes are developed based on qualification standards and/or occupational profiles.
	(3) The content, duration and expected outcomes of company and school-based learning are clearly distributed and form a coherent sequence.
	(4) There are provisions for adjusting part of curricula to local labour market needs.
	(5) (Minimum) requirements to access apprenticeship programmes are stipulated.
	(6) Final assessment covers all learning outcomes and is independent of the learning venues.
(5) Cooperation among learning venues	(1) There is cooperation, coordination and clear distribution of responsibilities among the venues as well as established feedback mechanisms.
	(2) A school, a company and an apprentice together develop a training plan, based on the curriculum.

Areas of analysis	Operational descriptors
	(3) In case a company cannot ensure the acquisition of all required learning outcomes for the company-based learning as defined by the curriculum, there are arrangements to compensate for that (for example, intercompany training centres, cooperation of companies, etc.).
	(4) One of the venues takes up (is designated by law) the coordinating role in the process.
	(5) It is clear who is responsible for the administrative tasks related to the company-based part of the programme (for example, checks the suitability of the accredited training enterprise, technically and personnel-wise, is responsible for logging of apprenticeship contracts, etc.).
(6) Participation of and support to companies	(1) Rights and obligations of companies providing training are legally stipulated. (2) There are strategies, initiatives in marketing apprenticeship and informing companies of benefits of taking apprentices, related responsibilities and available incentives. (3) There are minimum requirements for companies willing to provide apprenticeship places and/or an accreditation procedure. (4) Companies, especially SMEs, receive non-financial support to implement apprenticeship. (5) There is recognition and even award, for companies that provide quality apprenticeships. (6) Employer organisations play a key role in engaging and supporting companies.
(7) Requirements and support to teachers and in-company trainers	(1) Companies have to assign a qualified staff member (tutor) to accompany apprentices. (2) There are stipulated requirements for qualification and competences of an apprentice tutor. (3) An apprentice tutor in a company has to have qualification in the vocation he/she trains for. (4) An apprentice tutor in a company has to have some proof of pedagogical/didactic competence. (5) There is a provision of training for in-company trainers to develop and update their pedagogical/didactic and transversal competences and for teachers to update their technical competences.

Areas of analysis	Operational descriptors
	(6) There are mechanisms for cooperation and exchange between in-company trainers and VET teachers in schools.
	(7) There is a clear indication who (teacher or trainer) has ultimate responsibility for apprentices' learning.
(8) Financing and cost-sharing mechanisms	(1) Apprenticeship companies pay wages and cover indirect costs (materials, trainers' time).
	(2) The State is responsible for financing VET schools and/or paying grants to engage apprentices.
	(3) The duration and organisation of apprenticeships are such that it allows companies to recuperate the investment through apprentices' work.
	(4) There are incentives (subsidies, tax deductions) to encourage companies to take on apprentices, generally and/or in specific sectors or occupations.
	(5) Employer organisations and trade unions cover part of the costs (direct and/or indirect).
(9) Quality assurance	(1) Quality assurance system covers apprenticeship.
(10) Apprentice's working and learning conditions	(1) Rights and obligations of apprentices are legally stipulated, both for working and learning.
	(2) There is a reference point (responsible body) that informs the apprentice of rights and responsibilities of all parties and supports him/her in case of problems.
	(3) An apprentice has an employment contract with the company and enjoys all rights and benefits of an employee and fulfils all responsibilities.
	(4) An apprentice is protected in case of company failure (bankruptcy, for example) to provide training.
	(5) An apprentice has access to guidance and counselling services.
(11) Responsiveness to labour market	(1) There are institutional procedures that allow apprenticeship to respond to or to anticipate the needs of the labour market.
	(2) Outputs and outcomes of apprenticeship are regularly monitored and evaluated.
	(3) Ex-ante and/or ex-post impact evaluation of apprenticeship are in place.

The analytical framework is used as a tool throughout the review; it serves as a frame of reference for the data collection instruments and process, analysis and reporting.

B. *The inclusive, participatory and collaborative approach* is organised on two levels:

1. Steering of the review and validation: by the project launch, in each country, the relevant ministries will have appointed a steering group. The steering groups should represent national authorities from education and employment, social partners, educational and training institutions, national associations. The steering groups should be actively involved in all project activities and facilitate the delivery of results; they will also identify the priority areas for the review; and they have to collaborate closely with Cedefop's team. The steering groups will also have a validation role of the project findings and ensure the relevance and ownership of the project's results. During the validation workshops, the steering group members should discuss and achieve a common understanding on the main approaches, findings and possible solutions identified in the process of the review.
2. Stakeholders' involvement: at different stages of the review, a broader range representing all relevant stakeholders in the country may be involved in the process. More specifically, individual and groups of relevant stakeholders may be involved into in-depth discussions on the strengths, weaknesses, areas for improvement, solutions and policy, institutional, and organisational implications for the apprenticeship systems in their countries. The steering groups can decide to involve stakeholders in the validation of the findings as well.

C. *The iterative and evolving approach* will be applied to the review in its two phases:

Phase I: preliminary phase – setting the baseline and the specific focus of the review;

Phase II: implementation phase – surveying stakeholders, which has to be shaped on the basis of the outcomes of the preliminary phase, and it should be organised in **three consecutive rounds** of surveys. The iterative and evolving approach must be applied also, where each round will have its own objectives and will inform and feed the following one(s).

1. In Round 1, actual information on the implementation will be collected (micro-level) at the practitioners' and beneficiaries' level: from school leaders, teachers and trainers involved in apprenticeship implementation, companies involved and potential (chambers involved), and students (apprentices and potential) as well as other professionals, such as assessors or guidance counsellors. They will discuss things that work and that do not in the areas of priority. The respondents will also reflect on what is missing in the current practice and what support is needed.
2. In Round 2, building on findings of Round 1, opinions at the institutional level will be obtained on the possible causes, gaps, potential solutions (meso-level): relevant ministries, social partners, chambers, sector bodies, certification bodies, quality assurance bodies, guidance and counselling, etc..
3. In Round 3, policy-makers, social partners, experts and other system actors will assess and discuss proposed solutions and recommendations (macro-level).

2.3.2. Work assignments, tasks and expected deliverables for TCRs

The work on the TCRs will be organised in two work assignments, one per each country, of maximum 18 months duration per assignment. The work assignments will have the same expected activities, tasks and deliverables, as described below. However, the implementation of each of the work assignments will be country specific: it will have its specific focus dependent on the particular national challenges and priority areas for the review as identified by the Steering

Groups in each of the countries and specific set of methodological tools (e.g. data collection tools, number and type of stakeholders to be surveyed, etc.).

The contractor is expected to use the analytical framework described in 2.3.1 throughout all the phases of the assignments.

All deliverables should be in English, or in the national language of the country where indicated.

The contractor is expected to perform the following specific tasks by phase of the review implementation:

Phase I: Preliminary phase – setting the baseline and focus of the review.

- (a) Identifying features and conditions that are already present or are in the process of development: on the basis of primary and secondary data collection, the contractor will prepare a *background paper* that will provide a detailed description of the state-of-play of apprenticeships in the countries (stable features, legal basis, statistical information, mechanisms, arrangements, main stakeholders and actors), and the context that may elucidate the state-of-play. This background paper will be used as a basis for the further analysis.
- (b) Mapping the existing situation and identifying strengths, weaknesses and the priority areas for the review: on the basis of the background paper, the contractor will carry out a *first analysis of the strengths and weaknesses of the apprenticeship* in the volunteer countries. The findings of the analysis will be discussed with the Steering Groups in a validation workshop that will be organised in the country together with Cedefop (Box 1 below).

Box 1 – Validation workshop n. 1 with Steering Groups

As part of a validation workshop (validation workshop n. 1), the Steering Group members will assess the urgency of the identified weaknesses in the national context and agree on priority areas for the review. The validation workshop will be organised together with Cedefop in the country (1 validation workshop per country). The contractor will be asked to contribute to the preparation of the workshop, actively participate in it and take minutes.

- (c) Designing the strategy for Round 1 of stakeholders' surveys (see point 2.3.1.). Building on the results of the first validation workshops with Steering Groups, the contractor will propose and discuss with Cedefop the *strategy for Round 1 of stakeholders' surveys* (the strategy will be tailored to country and target group specificities): objectives, scope, specific guides, data collection tools, type of professionals to be surveyed, etc.

Deliverables of Phase I:

- Background paper (see (a) above);
- Background note, also in the national languages of the countries, for Validation workshop n. 1 containing the analysis of strengths and weaknesses as described in (b) above;
- Strategy for Round 1 of surveys (see (c) above) including interview guides (issues to be discussed and target groups).

Phase II: Implementation phase – surveying stakeholders.

- (a) Collecting primary information from stakeholders: the contractor should collect, through the most appropriate participatory methods, perspectives of individual and groups of stakeholders on (i) the state-of-play, (ii) underlying causes of the identified weaknesses under the priority areas for the review, and (iii) possible solutions.

The contractor will implement the three rounds of survey (see point 2.3.1.) The minimum number of individuals to be surveyed will be 100 in both countries.

Considering the country-specific nature of the task, the Contractor should rely on a team and/or network of national experts for carrying out country context analysis, validating the findings of desk research, identifying and reaching the stakeholders to be surveyed and ensuring the interviews in the national languages of the countries.

- (b) Summing-up and analysing the findings: after each round of surveys, the contractor will submit write-ups, analyse and summarise the findings and the implications for the following round (the findings of the different rounds of surveys will add to and complement the findings of the previous one(s)). Thus, the strategies for each round of surveys (objectives, scope, specific guides, data collection tools, type of stakeholders to be surveyed, etc.) will be submitted once the previous one is concluded and analysis of findings carried out.

Box 2 – Validation workshops n. 2 and n. 3 with Steering Groups

Two validation workshops (validation workshops n. 2 and n. 3) will be organised by Cedefop with the Steering Group members in the countries (a total of 2 validation workshops per country). The contractor will be asked to contribute to the preparation of the workshop, actively participate in it and take minutes.

As part of validation workshops n. 2, the Steering Group members will discuss the findings of Rounds 1 and 2 of surveys and possible solutions and recommendations will be formulated together with the Steering Group.

As part of validation workshops n. 3 and building on the results of Round 3, the Steering Group members will finalise and validate the solutions and suggestions for policy recommendations.

Deliverables Phase 2:

- Sets of write-up for each round of interviews in each country in a properly agreed format;
- Summaries and analysis of findings;
- Background notes with summary of the analysis of findings, also in the national languages of the countries, for validation workshops 2 and 3;
- Strategies for Rounds 2 and 3 for each country, including guides (issues to be discussed, target groups) for each round in agreed formats.

2.3.3. Project management

Responsible Department: Learning and Employability, Cedefop.

2.3.4. Facilities to be provided by the Contractor

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

2.4. Requested services and tasks for FLASH THEMATIC COUNTRY REVIEWS (ORDER FORMS c AND d AS PER PARAGRAPH 1.5)

2.4.1. Methodology

Alike the TCRs, the flash TCRs adopt an approach applied at a national level with no comparative purposes as primary goal. They are conceptually coherent with the TCRs as per the definitions and target groups. The flash TCRs, though, develop in a shorter time span; they do not foresee the country's ownership of the process: they focus on one (or more) specific area(s) of the apprenticeship systems to be selected by Cedefop on the basis of the analytical framework; and they promote a SWOT analysis of the selected area(s).

The flash TCR **methodology** relies on:

- (a) a common *analytical framework* is the same as the one used per the TCR and is meant to have the same function as reported in 2.3.1.
- (b) a *participatory and policy learning approach* is organised through stakeholders' involvement. By the project launch, for each country, Cedefop will have established contact with the country at national institutional level, in order to find one or more contact persons, who can be selected among the members of Cedefop's Governing Board of the two countries, or ReferNet experts, and who will be appointed as members of the national "panel of experts". These may be involved throughout the project to timely support the practical implementation of the review, for instance through in-depth discussions on the strengths, weaknesses, areas for improvement, solutions and policy, institutional, and organisational implications for the apprenticeship systems in their countries. Furthermore, Cedefop will select the specific area(s) of the apprenticeship systems to be reviewed, and discuss main findings throughout the project with the national panel of experts.

The flash TCR evolves in **two phases**:

Phase I: preliminary phase – setting the baseline and preparing round 1 interview. By the project launch, for each country, Cedefop will have established contact with the country at national institutional level; defined the scope of the flash TCR, i.e. the area(s) of the Analytical Framework to be analysed; identified broad target groups of interviewees for Round 1 accordingly.

Phase II: implementation phase and analysis – surveying stakeholders, which is organised in two consecutive "flash rounds" of interviews.

1. Flash round 1 will collect information about the priority area(s) of analysis selected for each country. The goal is gathering the deepest understanding of the strengths and weaknesses of the specific area(s) of apprenticeships considered, as reflected in the opinions of the national stakeholders emerged during the interviews. Cedefop will identify the relevant broad target groups by the project launch. During the surveys, discussions at the appropriate governance levels should focus on things that work and that do not in the area(s) of priority; on what is missing in the current practice and what support is needed; and, if applicable, they should identify good practices. The SWOT analysis of the flash round 1 of interviews should distinguish between the level of the policy design and the level of the implementation.
2. Flash round 2 should build on the findings of the first round and address stakeholders at the institutional level, including policy-makers, social partners and experts. These will be called to assess and discuss findings and propose policy- and practice-oriented solutions. The strategy for the second round of surveys (objectives, scope, specific guides, data collection tools, type of stakeholders to be surveyed, etc.) will be submitted once the first round is concluded and analysis of findings carried out.

2.4.2. Work assignments, tasks and expected deliverables

The work on the flash TCR will be organised in two work assignments, one per each country, of maximum 10 months duration per assignment. The work assignments will have the same expected activities, tasks and deliverables, as described below. However, the implementation of each of the work assignments will be country specific: it will have its specific focus dependent on the particular national challenges and priority area(s) for the review, as identified by Cedefop in each of the countries, and specific sets of methodological tools (e.g. data collection tools, number and type of stakeholders to be surveyed, etc.).

The contractor is expected to use the analytical framework described in 2.3.1 throughout all the phases of the assignments.

All deliverables should be in English.

The Contractor is expected to perform the following specific tasks by phase of the review implementation:

Phase I: Preliminary phase – setting the baseline and focus of the review:

- (a) Providing an up-to-date complete set of information about the apprenticeship system in the country. By the project launch, Cedefop will provide *country fiches*, which the contractor will update, by reporting a description of the state-of-play of apprenticeships, including: stable features, legal basis, statistical information, mechanisms, arrangements, main stakeholders and actors.
- (b) Reviewing *strengths and weaknesses*: on the basis of the country fiche, and focusing on the scope of the review as indicated by Cedefop, the contractor will carry out a preliminary review of the strengths and weaknesses. The contact person(s), at national level, indicated by Cedefop (i.e. panel of experts) will be consulted to comment or advice on the findings of the desk analysis.
- (c) Designing the *strategy for flash Round 1* of surveys: by the project launch, consistently with the defined scope of the review, Cedefop will indicate the broad target group for flash round 1 of interviews. Building on the results of desk-based research (a) and of the consultation at national level (b), the contractor will propose and discuss with Cedefop the strategy for the first flash Round 1 of interviews (the strategy will be tailored to the country, the scope and the specificities of each target group, as indicated by Cedefop): objectives, specific guides, data collection tools, etc.

Deliverables of Phase I:

- Updated country fiches (see (a) above);
- Background country notes about the review of strengths and weaknesses as described in (b) above;
- Strategy for Round 1 of surveys (see (c) above) including survey guides.

Phase II: Implementation phase – surveying stakeholders

- (a) *Collecting primary information from stakeholders*: the contractor will collect, through the most appropriate data collection methods, perspectives of individual and groups of stakeholders on (i) the state-of-play, (ii) underlying causes of the identified weaknesses

under the priority areas for the review, (iii) good practices and (iv) proposals for policy- and practice-oriented solutions.

The contractor will implement the two rounds of surveys (see point 2.4.1.) The minimum number of individuals to be surveyed will be:

- 80 in Belgium⁴;
- 60 in Sweden.

Considering the country-specific nature of the task, the Contractor should rely on a team and/or network of national experts to enable carrying out country context analysis, identifying and reaching the stakeholders to be surveyed and ensuring the surveys are performed in the national languages of the countries.

- (b) *Summing-up and SWOT analysis of the findings*: after the first round of surveys, the contractor will submit write-ups, SWOT analysis, based on and reflecting the opinions of the stakeholders gathered through the first round of interviews, and the summary of the findings, as well as the implications for the following round. Thus, the strategy for the second round of surveys (objectives, scope, specific guides, data collection tools, type of stakeholders to be surveyed, etc.) will be submitted once the previous one is concluded and analysis of findings are carried out.

Deliverables Phase 2:

- Strategy for round 2 of survey: including survey guides (issues to be discussed, target groups) in agreed formats and write-ups.
- Summaries and SWOT analysis of findings of round 1, as described in (b) above;
- Summaries of findings of round 2;
- Country reports, including identified good practices and country specific solutions.

2.4.3. Project management

Responsible Department: Learning and Employability, Cedefop.

2.4.4. Facilities to be provided by the Contractor

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

2.5. Requested services and tasks for policy learning and dissemination event (ORDER FORM E AS PER PARAGRAPH 1.5)

A policy-learning and dissemination event may be organised in Thessaloniki by Cedefop, where the countries, including those that participated in Cedefop's TCRs from the beginning, will share their experiences and lessons learned in TCRs and flash TCRs with representatives of other Member States. Experts and policy-makers will be invited to participate in peer-learning activities about lessons learnt, policy recommendations, solutions, good practices and to comparatively assess their own apprenticeship schemes/programs and benefit from mutual learning.

⁴ The number of interviews in Belgium is higher than in Sweden taking into account the complexity of the country, due to the presence of the 3 communities.

The contractor will actively participate in the policy-learning and dissemination event supporting the exchange of lessons learned from the reviews, policy recommendations, solutions and good practices.

2.6. Reports

2.6.1. Reporting requirements per work assignments for TCRs (order forms a) and b), as per paragraph 1.5)

The following reports in English will be required for **each of the work assignments**.

(a) Inception report

An inception report will be submitted 4 weeks after the date on which the order form is signed by the last contracting party and it will include: desk-researched information on state-of-play of apprenticeships in the country of the work assignment which will feed into the background paper, and outlining process and timetabling of the research and services provided. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

(a) First progress report

A draft of the first progress report will be submitted 4 months after the entry into force of the Order Form and it will include: the background paper, the background note also in the national languages, containing the analysis of strengths and weaknesses to be discussed during Validation workshops n. 1, the strategy for Rounds 1 of surveys, and work progress. Cedefop will provide comments on the first progress report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

(b) Second progress report

A draft of the second progress report will be submitted to Cedefop 8 months after the entry into force of the Order Form and it will include: summary and analysis of findings of the survey Round 1, strategy for the second round of interviews, and work progress. The draft will be discussed with the members of the Steering Group on the occasion of the validation workshops n. 2. The final text will be submitted after the validation workshops 2. Cedefop will provide comments on the second progress report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

(c) Final activity report

A draft of the final activity report will be submitted to Cedefop 14 months after the entry into force of the Order Form and before validation workshops n. 3. The report will be based on the overall findings and will mainly include a country report addressing policy background, context and analysis; possibly, with operational tools, including guidelines, monitoring systems and so forth put forward as they came out from the three rounds of interviews, and validation workshops n. 1 and n. 2. The draft will be discussed with the members of the Steering Group on the occasion of the validation workshops n. 3. The final text will be submitted after the validation workshops n. 3. Cedefop will provide comments on the final activity report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

2.6.2. Reporting requirements per work assignment for flash TCRs order forms c) and d), as per paragraph 1.5)

The following reports in English will be required for **each of the work assignments**.

(a) Inception report

An inception report will be submitted 4 weeks after the date on which the order form is signed by the last contracting party and it will include: the updated country fiches based on desk research, a draft review of strengths and weaknesses, an outline of the process, timetabling, communication and management plan for the research and services provided, and a draft strategy for round 1 of interviews. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

(b) Final report

A draft of the final report will be submitted to Cedefop 8 months after the entry into force of the service contract and it will include: country reports including finalised country fiches, summary and SWOT analysis of findings of Round 1, lessons learned, identified good practices and country specific solutions. A common chapter for both countries should reflect on the flash TCRs methodology strategy and include proposals for its review/improvement. Cedefop will provide comments on the final report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s).

2.6.3. Reporting requirements per work assignment for policy-learning and dissemination event (order form e), as per paragraph 1.5)

A short report about the outcomes of the policy-learning and dissemination event with a view to sharing lessons learned from the reviews and identifying good practices.

2.6.4. Submission & approval of all reports

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

2.6.5. Proof-reading & editing in English of final reports

The selected Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English. The reports have to comply with Cedefop style manual attached in Annex K.

2.7. Meeting and Travel Expenses for TCRs and flash TCRs (order forms a), b), c) and d), as per paragraph 1.5)

2.7.1 Management Meetings

The expert(s) responsible for the co-ordination of the work assignments on behalf of the contractor will be required to attend the following **one-day (or two-half day) meetings at Cedefop premises (in Thessaloniki)** with the project manager(s) responsible:

- (a) First management meeting to take place approximately 4 weeks following signature of the respective Order Form(s) to fine-tune the final planning of the activities and services described in the inception reports, with minimum 1 national expert per country participating in this meeting;
- (b) Second management meeting to take place around 8 months after the entry into force of the respective Order Form(s):

- a. to present the final outputs/outcomes of the flash TCRs, focusing on the policy messages to be included in the final country reports,
 - b. to discuss possible methodological improvements of the flash TCRs;
 - c. to discuss the second progress report for the TCRs, in particular the strategy for Round 2 of interviews, and the organisation of the validation workshops n. 2.
- (c) Third management meeting involving also the national experts for each of the two (2) TCRs, to take place after validation workshop 3 of the TCRs but not later than month 17 of the Order Forms:
- a. to present the final outputs/outcomes of the TCRs and policy messages to be included in the final report;
 - b. to discuss possible methodological improvements of the TCRs;
 - c. to organise the policy-learning and dissemination event.

Cedefop's intention is to have the management meetings common for work assignments a), b), c) and d) i.e. for all 4 countries. If this is not feasible then more meetings will be organised. For the sake of transparency in the evaluation process, the tenderers are requested to fill in the financial tables for 10 different meetings (4x first management, 4x second management and 2x third management meeting).

2.7.2 Policy-learning dissemination event for TCRs and flash TCRs

The contractor must participate in the policy-learning and dissemination event under 2.5 as follows: the expert(s) responsible for the co-ordination of the work assignments on behalf of the contractor, as well as **at least 1 national expert per country** will be required to participate in the policy-learning and dissemination event **(1.5 day event) that will take place in Thessaloniki.**

The above meeting in Thessaloniki will be common for all TCRs and flash TCRs work-assignments.

The expert(s) responsible for the co-ordination of the work assignments for TCRs on behalf of the contractor will be required to participate with **at least 1 national expert** in validation workshops n. 2 and n. 3 **(one day event) in each of the two countries;**

2.7.3 Travel expenses related to the field of work activities

The contractor is to define the methodology and as such the field work activities (e.g. interviews, round tables, focus groups, workshops, etc.) necessary to perform the tasks.

2.7.4 Whenever necessary, Cedefop may decide to organise additional management meetings

Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the Draft Contract in Annex B).

Social Security Contributions and Compliance with Labour Law

The contractor has the obligation

a) to comply with the labour laws, such as the legislation referring to the payment of the employees' salaries in line with the respective employment contract, as well as the collective agreements of the Member State where the contractor is established

and

b) to fulfil obligations relating to the payment of social security contributions of their personnel assigned to Cedefop in accordance with the legal provisions of the country in which they are established or those of Greece.

In case of non-fulfilment of these legal requirements, the Contracting Authority will consider relevant measures, as set out in the Framework Service Contract, such as the termination of the contract.

Cedefop reserves the right to check any documentation describing the above mentioned requirement throughout the whole duration of the contract.

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation to this tender procedure is only open to tenderers who are in a position to subscribe in full to the “**Declaration on honour on exclusion criteria and selection criteria**”, given in Annex C. All tenderers, all group (consortium) members (if any) and any subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) **MUST** provide the declaration on honour found in Annex C duly signed and dated.

3.1. Exclusion Criteria

The purpose of the exclusion criteria is to determine whether an economic operator / tenderer is allowed to participate in the procurement procedure or to be awarded the contract.

The exclusion criteria will be assessed in relation to each company individually. In the event of recommendation for contract award, evidence will be requested as described in Annex C (last page).

3.2. Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed statements from those entities. Please note that natural persons (individuals, freelancers) are also considered ‘entities’ for this purpose.

3.2.1. Economic and Financial capacity

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

Requirement:

- The average annual turnover of the tenderer for the last three (3) financial years concerning the type of services similar in nature to those making the subject of this call for tenders, i.e. socio-economic research and policy analysis, should be at least **EUR 600,000**.

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

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last three (3) financial years concerning the type of services similar in nature to those making the subject of this call for tenders, i.e. socio-economic research and policy analysis.

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

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors. For tenderers or sub-contractors (identified as per any of the two bullet-points in paragraph 4 of Art. 4.2 below) who are natural persons / freelancers, a tax declaration and tax clearance statement for the last three financial years will be requested.

If, for some exceptional reason the winning tenderer (or any consortium member or subcontractor) is unable to provide one or other of the above documents, they will be required to justify the non-provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2. Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract.

They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements for Technical and professional capacity:

- Have adequate structure and resources to perform the services described in the Terms of Reference.
- Have adequate experience in the field of research and comparative analysis on vocational education and training, having performed **contracts** with a total minimum contract value of EUR **600,000** during the last three (3) years (to have been concluded by the deadline of submission of offers).
- The Tenderer's team of experts, who will be proposed to implement the contract, must have knowledge and experience, relevant to the subject of the contract profiles, for its successful implementation. In particular, the tenderer must comply with the following minimum requirements:

- Team leader (1 member) must have:
 - University degree in social sciences;
 - A minimum of 8 years of experience in research and/or policy analysis on vocational education and training and/or labour market at international level, of which a minimum of 5 years of experience in coordination and management of research and/or policy analysis on vocational education and training and/or labour market at international level;
- Senior international expert A must have:
 - University degree in social sciences;
 - A minimum of 5 years of experience in research and/or policy analysis on vocational education and training at international level;
- Senior international expert B must have:
 - University degree in social sciences;
 - A minimum of 5 years of experience in research and/or policy analysis on vocational education and training at international level, of which at least 3 years of experience in designing and using qualitative data collection tools, for example: conducting interviews, workshop facilitation, and focus group organisation;
- 2 junior international experts must have:
 - University degree in social sciences;
 - 2 years of experience in research and/or policy analysis on vocational education and training, and in the use of qualitative data collection tools, for example: conducting interviews, workshop facilitation, and focus group organisation;
- For Croatia: 2 senior national experts and 1 junior expert
- For Cyprus: 2 senior national experts and 1 junior expert
- For Belgium: 3 senior national experts and 1 junior expert
- For Sweden: 3 senior national experts and 1 junior expert

For each of the four countries:

- Senior national experts must have:
 - University degree in social sciences;
 - 5 years of experience in research and/or policy analysis on vocational education and training in the relevant country, of which 2 years of experience in research and/or policy analysis on apprenticeships in the relevant country, and 2 years of experience in designing and using qualitative data collection tools, for example: interviews, workshops and focus groups;
- Junior national experts must have:
 - University degree in social sciences;
 - 2 years of experience in research and/or policy analysis on vocational education and training in the relevant country, of which 1 year of experience in using qualitative data collection tools, for example: conducting interviews, workshop facilitation, and focus group organisation.

All experts (including the national experts) should be able to speak and write in English at Level C1 of the Common European Framework of Reference for Languages. In addition the mother tongue of all senior and junior national experts should be the official language of the country they are assigned to. Alternatively, the national experts should be able to speak and write in the national languages of the countries they are assigned to, at level C2 of the Common European Framework of Reference for Languages⁵.

Proofs / Evidences of Technical and professional capacity

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

- Brief company profile to prove the ability, technical know-how, experience and expertise needed for the provision of the required services under this call for tenders (please fill-in Questionnaire 4 of Annex G);
- List of **contracts performed** in the past three (3) years in the field of research and comparative analysis on vocational education and training, describing the contracting authorities, the subjects, the dates, the amounts of the overall budget and the percentage of the overall budget performed by the tenderer (please fill-in Questionnaire 3 in Annex G);
- The **Europass curriculum vitae** format (<http://europass.cedefop.europa.eu>) or similar format shall be filled in by each person involved in the execution of the tasks foreseen in the tender. CVs must clearly specify – at the top of the first page – the role of the expert in the team (Team Leader, Senior International Expert, Junior International Expert, Senior National Expert, or Junior National Expert).
- **For each CV Questionnaire 5 of Annex G must also be filled-in**, synthesising information aimed at demonstrating the professional capacity of the team member as above requested. In particular in Questionnaire 5 of Annex G clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, main activities and responsibilities), and clearly present the linguistic abilities. In addition the CV of the team leader should also include a list of his/her publications relevant to the subject of the call.

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (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**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in

⁵ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

accordance with Commission Recommendation 2003/361/EC which can found in the following link: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.

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 (who sign(s) the cover letter as per point 4 of the Invitation to tender) authorised to sign contracts with third parties.

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER 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 36 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 5 SAA Countries (FYROM, Albania, Serbia, Montenegro and Bosnia & Herzegovina).

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

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

4.1. Joint Offers/ Groupings (Consortia)

- Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.
- Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.
- If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.
- A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.
- Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).
- Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.
- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of

the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

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

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault. Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

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.

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

Only in cases when:

- a Subcontractor undertakes between 10,01% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

the tenderer should submit with the offer:

1. the **“Declaration on honour on exclusion criteria and selection criteria”** (Annex C) filled-in and signed by the respective Subcontractor;

2. the documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2 necessary for evaluating of the combined capacity (as a whole) of the tenderer together with his subcontractor(s);
3. the Form in Annex J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective Subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract

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

5. AWARD OF THE CONTRACT

The evaluation of the exclusion, selection and award phase will be done in **NO** particular order. If the tenderer or the tender does not pass a phase, it will not be evaluated under the other remaining phases.

The contract shall be awarded to the tenderer submitting the best price-quality ratio method 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, namely A, B and C** in the table below under 5.1, and **in total a minimum of 60 out of 100 points (TQV)** in the technical evaluation – see below).

5.1. Technical evaluation

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

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

Award criteria – Evaluation grid	Maximum number of points
A. UNDERSTANDING AND RATIONALE OF THE PROJECT <i>Point 2 of the framework template in section 5.2.</i>	20
1. In-depth understanding and reflection on the importance of the topic of apprenticeships at the European level;	5
2. In-depth understanding and reflection on the importance of the topic of apprenticeships at national levels in the four countries under review.	15
B. METHODOLOGY – Methods and tools with relevant distinctions between TCRs and flash TCRs <i>Point 3 of the framework template in section 5.2.</i>	55

1. Reflections on and general approach to applying the analytical framework (see 2.3.1);	10
2. Methods and tools to primary and secondary data collection and possible sources of information;	15
3. Approach to surveying the stakeholders (by country and by type of TCRs): - country specific strategies to ensure meaningful coverage given the different sizes of the countries; - possible categories of stakeholders, methods to identifying stakeholders, and estimated number of individuals to be surveyed.	20
4. Proposal for the contribution to the policy-learning and dissemination event	5
5. Communication and collaboration with Cedefop, given the evolving nature of the project activities.	5
C. ORGANISATION, PROJECT MANAGEMENT AND STAFF ALLOCATION	25
1. Project management, work organization and team work (reporting; function and role of the team leader; management structure; distribution of tasks among experts). <i>Point 4 of the framework template in section 5.2.</i>	10
2. Quality assurance and risk management (tools and processes to be used taking into account the specific characteristics of the project; back-up/replacement arrangements; adequate consideration of possible hindrances). <i>Point 5 of the framework template in section 5.2.</i>	5
3. Organization of the work process (timetable and project's workflow outlining the intended organisation and milestones, and demonstrating the feasibility of the proposal). <i>Point 6 of the framework template in section 5.2.</i>	10
OVERALL TOTAL SCORE (Total Quality Value - TQV)	100

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

- do not reach a minimum of 50% of the possible score for each award (evaluation) criterion, namely A, B and C in the table above and
- obtain an overall total score (Total Quality value) of less than the total **60** (of a maximum of 100) points against the award (technical) criteria,

will not be considered acceptable and will be eliminated from further evaluation. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.3).

5.2. Technical proposal

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference in point 2 above providing a practical, detailed description of the goods or services proposed for performance of the contract.

As specified in sections 1.5 and 1.6 above, Cedefop will conclude with the selected tenderer a single framework contract of maximum 36 months which establishes the basic terms for five (5)

order forms, each one related to one work assignment. Order forms should be carried out over a period of maximum:

- 18 months for the work assignments related to the TCRs (a) and (b) as per 1.5;
- 10 months for the work assignments related to the flash TCRs (c) and (d) as per 1.5;
- 6 months for the work assignment related to the policy-learning and dissemination event (e) as per 1.5.

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

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide a proposal on the basis of the **following scheme**:

1. Summary of proposal
 - 1.1. Overall synthesis (in bullets);
 - 1.2. Highlighting of the key/qualifying aspects of the proposal;
 - 1.3. Any additional services offered (compared to the ToRs).
2. Rationale of the project
 - 2.1. A concise discussion on the subject, demonstrating in-depth understanding and reflection on the importance of the topic of apprenticeships at the European and national levels in the four countries under review;
 - 2.2. Comments on the Terms of Reference and key issues to the achievements of expected results;
3. Methods and tools, with relevant distinctions for TCRs and flash TCRs
 - 3.1. Reflections on and general approach to applying the analytical framework throughout the reviews;
 - 3.2. Methods and tools to primary and secondary data collection and possible sources of information;
 - 3.3. Approach to surveying the stakeholders (by country):
 - 3.3.1. Country specific strategies to ensure representative/meaningful geographical coverage given the different sizes of the countries;
 - 3.3.2. Possible categories of stakeholders, methods to identifying stakeholders, and estimated number of individuals to be surveyed;
 - 3.4. Proposal for the contribution to the policy-learning and dissemination event
 - 3.5. Communication and collaboration with Cedefop, given the evolving nature of the project activities.
4. Project management, work organization and team of experts (explanation of the nature and extent of the team members and experts' participation in the project)
5. Quality assurance and risk management
6. Timetable and project's workflow

The maximum length of the Technical Proposal to be submitted is **40 pages** (all included except table of contents as well as start and end pages). The font should correspond to Times New Roman size 12 pt. with single line spacing and standard margins of 2.5 cm.

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

The tenderer shall identify a Project Manager within his/her organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Manager or two different persons can be identified. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

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

Tenderers are requested to include their technical proposal (envelope B) in one original and three hard copies and in a form of a read access secured CD.

The content of the technical proposal in the hard copies and the one in the CD must be identical.

In case of discrepancies between the hard copies and the CD, the hard copies shall take precedence.

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

5.3. Financial evaluation

Only tenders scoring in total 60 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 (technical evaluation) criterion, namely A, B and C in the table above under point 5.1 will be admitted to the subsequent evaluation stages. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer TFO**) in the Price schedule table in Annex H (see also point 5.4).

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

*$$\text{Financial score} = (\text{cheapest Financial Proposal} / \text{Financial Proposal of the tender considered}) * Y.$$*
Where Y = price weighting (see the complete formula under point 5 above) = 30

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

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

5.3.1. Evaluation of abnormally low prices

If any tender's price appears to be abnormally low in relation to the services offered, and in order to check if the tender can be considered valid, the evaluation committee will, before it may reject this tender, send a request for clarifications to ask for explanations on the components of the tender which it considers relevant to the presumed abnormally low price and shall verify those constituent elements taking account of the explanations received. If in that relation the tenderer

cannot explain his price on the basis of the economy of the services or supplies offered, or the method used, or the technical solution chosen, or the exceptionally favourable conditions available to the tenderer, the tender will be rejected.

A price will be considered abnormally low if the financial offer of any tenderer is lower with more than the acceptable margin of deviation from the average price of the other technically acceptable offers (please note that definition of which offers are technically acceptable/ compliant is given in points **5**, **5.1** and **5.2** above). The actual deviation will be calculated as % as follows:

The difference between the average price of the other technically acceptable offers and the value of the presumably abnormally low financial offer will be divided by the average price of the other technically acceptable offers.

The acceptable margin of deviation is set to **30%**.

The approach of the Evaluation Committee to identify and eliminate abnormally low tenders will be the following:

- a) apply the acceptable margin of deviation from the average price of the other technically acceptable offers and set aside the offers that go beyond it;
- b) check if specific notes or specific items included in the offer justify to some extent the deviation; if not, or if inadequate, send relevant request for explanation(s) to the tenderer concerned;
- c) decide on the acceptability of the offer on the basis of the notes in the tender and/or the clarification reply received.

5.3.2. Financially unacceptable tenders

In the context of financial evaluation, the Evaluation Committee could find that tenders are unacceptable because the price is:

- abnormally low (see point 5.3.1);
- 15% or more above the estimated budget announced in these Tender Specifications (see point 1.5).

Such tenders will have to be rejected by the Evaluation Committee, independently of their quality value as determined in the preceding (technical) evaluation stage.

5.4. Financial Proposal

Tenderers should not disclose their financial offer in any part of their tender (technical proposal, cover letter) other than the sealed envelope C.

The financial offer must be clear and in compliance with the tender specifications.

The Financial Proposal should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderers must fill-in the Price schedule table in Annex H and present a detailed breakdown of the price offered.

The Financial Proposal should clearly match the Specifications (*the Terms of Reference*) and the estimate of value. All services that shall be procured should be included.

All costs foreseen, including travel & accommodation, related to Cedefop's management meetings have to be included in the financial offer in Annex H (see Tables 1 & 2, items 2a, 2b and 2c, and Tables 3 & 4, items 2a and 2b).

All costs foreseen, including travel & accommodation related to the policy learning event have to be included in the financial offer (see Table 5 in Annex H).

All travel expenses related to the field-work activities have also to be included in the financial offer (see Tables 1 & 2 item 2e and tables 3 & 4 in Annex H, item 2c).

All costs foreseen, including travel & accommodation related to validation workshops sets 2 and 3 have to be included in the financial offer (see Tables 1 to 2 in Annex H, item 2d).

The cost of professional proof-reading and editing in English of the final report(s) as submitted to Cedefop (see point 2.6.5) should be included in the Financial Proposal (item 2f in tables 1 & 2 and item 2d in tables 3 & 4 in Annex H).

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in EURO and include all expenses.
- The VAT amount must be indicated separately (this applies to tenderers established in Greece only).

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.

[For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.]

For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.

[In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".]

Reimbursement of travel expenses

All costs foreseen (travel, accommodation etc) related to Cedefop's meetings have to be included in the financial offer in Annex H (see Tables 1 to 5 in Annex H).

Any extra travel, accommodation, etc. expenses besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract).

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

In addition, below you will find details of the required documentation.

6.1. Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the “Declaration on honour on exclusion criteria and selection criteria” requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 6 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.
- a read access secured CD containing the submitted in paper form technical proposal

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal (Annex H to be filled in) containing all information requested in point 5.4.

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 on honour on exclusion criteria and selection criteria”

(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

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

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please explain the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s))	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Declaration on Exclusion & Selection Criteria (including those of consortium members and subcontractors, if applicable)	3, 6.1 & Annex C	☐	☐	
- selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1 - 6 (Annex G)	3.2, 4.1; 6.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (model 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2, 6.1 & Annex J	☐	☐	
- Legal Entity Form	3.3, 6.1 & Annex D	☐	☐	
- Financial Identification Form	6.1 & Annex E	☐	☐	
- this Checklist	6.1 & Annex F	☐	☐	
<u>Envelope 'B' must contain</u>				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.2, 6.2	☐	☐	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4, 6.3 & Annex H	☐	☐	

The tenderers should also ensure that:

☐	the offer is formulated in one of the official languages of the European Union.
☐	both the technical and financial proposals of the offer are signed by duly authorised agent.
☐	the offer is perfectly legible in order to rule out any ambiguity.
☐	the offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	the outer envelope bears the information mentioned in the invitation to tender point 3.

ANNEX G

Questionnaires 1 - 6

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

ANNEX H

Financial Proposal

(Given as a separate Excel file)

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 separate file in *pdf format)*