



CEDEFOP

European Centre for the Development
of Vocational Training

FINANCE AND PROCUREMENT

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OPEN INVITATION TO TENDER

“Apprenticeships: A Cross-National Overview”
AO/DLE/RCDC-LRUST/CrossNationalOverview/013/15

REFERENCE: **Contract notice - 2015/S-188-340261 of 29/09/2015**

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),
 Procurement Service, Attention of Mr G. Paraskevaïdis
 PO Box 22 427
 GR – 55102 Thessaloniki, Greece**

Important:

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

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

- ✓ that they have submitted an offer in time, and
- ✓ that they request Cedefop to confirm receipt of the e-mail or fax.

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

or

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

or

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

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

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service, Attention of Mr G. Paraskevaïdis
123, Europe Str,
GR-57001 Thessaloniki-Pylea, Greece
Tel: +30 2310 490111 / 490 064**

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

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

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

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

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

OPEN INVITATION TO TENDER CEDEFOP No AO/DLE/RCDCR-LRUST/CrossNationalOverview/013/15 <i>‘Apprenticeships: A Cross-National Overview’</i> Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in section 2 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. It is mandatory to include in the offer a **Cover Letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
5. **Submission of a tender implies acceptance of all the terms and conditions set out in this Invitation to Tender, in the specifications and in the draft contract and**, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on the date and time specified in the timetable in point 8 below. Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

7.1 Contacts before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the tender documents. Any request for additional information must be made in writing by e-mail (C4T-services@cedefop.europa.eu) or by fax (fax No +30 2310 490 028).

Requests for additional information/clarification (if any) from potential tenderers should preferably be written in English and should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

- Cedefop may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tenders.

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/EN/working-with-us/public-procurements/calls-for-tenders.aspx>). **Tenderers must 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)	30/10/2015	N/A
Last date on which clarifications are issued by Cedefop	as soon as possible	
Deadline for submission of tenders (hand delivered)	09/11/2015	17h00
Deadline for submission of tenders by post / courier	09/11/2015	N/A
Validity of the tenders	09/05/2016	N/A
Tender opening session	17/11/2015	11h00
Estimated contract signature date	18-22 December 2015	

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon: the signature of 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 (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in:
 - the Commission Decision 2008/969 of 16.12.2008 on the Early Warning System (for more information see the Privacy Statement on http://ec.europa.eu/budget/info_contract/legal_entities_en.htm), or

- the Commission Regulation 2008/1302 of 17.12.2008 on the Central Exclusion Database (for more information see the Privacy Statement on http://ec.europa.eu/budget/library/sound_fin_mgt/privacy_statement_ced_en.pdf).
15. All tenderers will be informed in writing of the results of this tender procedure.
 16. Once Cedefop has opened the tender, the document shall become the property of Cedefop and it shall be treated confidentially.
 17. You will be informed of the outcome of this procurement procedure by e-mail. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check it regularly.

Yours sincerely,

signed G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DLE/RCDC-LRUST/CrossNationalOverview/013/15

Apprenticeships: A Cross-National Overview

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

To provide people with the skills they need, vocational education and training 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 ⁽¹⁾ 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).

⁽¹⁾) Cedefop also works with Iceland and Norway.

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

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

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

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and 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 his 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 Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

(a) Title of the contract:

Apprenticeships: A Cross-National Overview

(b) Short description of content of the contract:

This service contract falls under Cedefop's activity on policy learning, namely, understanding what apprenticeships are in the EU Member States as concerns laws, policies and practices, with a view to supporting countries in setting up or modernising their apprenticeship systems.

The contractor will assist Cedefop to:

- Map the existing apprenticeships in the EU Member States, plus Iceland and Norway, as defined by relevant national legislation or embedded in the VET systems²;
- Identify those countries where apprenticeships meet a set of pre-defined criteria (see paragraph 2.2.2), and provide an up-to-date description of what is in place in these countries;
- Analyse apprenticeships in the selected countries in order to classify them into apprenticeship types/models on the basis of a theoretical framework;
- Map the ongoing initiatives under the European Alliance for Apprenticeships³, and set the basis for its systematic monitoring.

(c) Type of contract: Service Contract (Study Contract related to research)

² (Small) pilot projects which are not part of a 'systemic approach' to apprenticeships are not part of the mapping

³ EAFa homepage: http://ec.europa.eu/education/policy/vocational-policy/alliance_en.htm

1.2. Place of delivery or performance

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

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications. Cedefop will disregard any variants described in a tender, and further 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 **250,000 €** (VAT excl.).

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party and shall have a total duration of **maximum 14 months**.

1.7. Main terms of financing and payment

Payments will be made as follows:

- **Pre-financing:** 30% after contract signature and within 30 days of submission of invoices and at the conditions set out in the draft contract.
- **Interim payment:** 30% after submission of 1st interim report and within 60 days of submission of invoices and at the conditions set out in the draft contract.
- **Payment of the balance:** 40% after submission of final report and 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 to the tender documents).

2. TERMS OF REFERENCE

2.1. Background information

The concept of apprenticeship is an old one in Europe and it has received increased attention by national governments in the EU in the last decade, especially in most recent years, due to the tremendous impact of the crisis on youth employment.

Cedefop defines “apprenticeship” as “systematic, long-term training alternating periods at the workplace and in an educational institution or training centre. The apprentice is contractually linked to the employer and receives remuneration (wage or allowance). The employer assumes responsibility for providing the trainee with training leading to a specific occupation”⁴.

Apprenticeship national agendas embrace many long-standing issues concerning schooling, training and employment. The interest for apprenticeships is increasing, since they are associated to a number of benefits, for the individual learners, for the companies that use them and for the overall society alike. Among other things, apprenticeships are regarded as potential tools to support school-to-work transitions, enhance young people employability, qualify the labour force and prepare it for lifelong learning, and also to help lowering youth unemployment rates.

Attention has been devoted to apprenticeships also at the European level. The European Commission and Cedefop promote and support the development of policies and programmes to ensure the availability of quality apprenticeships. Related ongoing work on apprenticeships includes:

- Cedefop’s Thematic Country Reviews on apprenticeships
- ReferNet-Cedefop articles on apprenticeships
- European Commission’s studies, including:
 - Apprenticeship and Traineeship Schemes in EU27: Key Success Factors, A Guidebook for Policy Planners and Practitioners, Technical annexes and Country fiches, December 2013
 - The effectiveness and costs-benefits of apprenticeships: Results of the quantitative analysis, September 2013
 - Work-Based Learning in Europe. Practices and Policy Pointers, June 2013
 - Apprenticeship supply in the Member States of the European Union, January 2012.

Cedefop supports the cooperation at European level, among Member States and social partners, and helps individual countries to foster the development of quality apprenticeships, in the context of the European Alliance for Apprenticeships. Conceived in 2012, the “European Alliance for Apprenticeships” (EAfA) was launched in July 2013 as a joint initiative by DG Education and Culture and DG Employment, Social Affairs and Inclusion. It was supported by the first-ever joint Declaration by the European Commission, the Presidency of the EU’s Council of Ministers and European level trade union and employer organisations (the European Trade Union Confederation (ETUC), BusinessEurope, the European Centre of Employers and Enterprises providing Public services (CEEP) and the European Association of Craft, Small and Medium Sized Enterprises (UEAPME)). On 22 June 2015, a high-level

⁴ Cedefop (2014). [*Terminology of European education and training policy: a selection of 130 terms*](#). 2nd ed. Luxembourg: Publications Office.

Presidency event was organised in Riga to mark the two years of the EAfA existence and to give it a new boost. Seven countries and 38 new pledges from stakeholders were made in Riga adding up to a total of 84 pledges. The three Baltic States signed the "Baltic Alliance for Apprenticeships".

The EAfA is conceived as an umbrella for a broad variety of initiatives that can be undertaken by all relevant stakeholders to improve the quality, supply and image of apprenticeships across the EU, such as:

- studies and mapping exercises;
- formal commitments and “pledges” of organisations to engage in initiatives and the establishment of bilateral and national agreements, initiatives, and cooperation mechanisms;
- peer review and peer counselling activities;
- raising awareness of the benefits of apprenticeships through sharing success stories of training companies and trainees.

The EAfA measures are supported by the European Social Fund, the Youth Employment Initiative and the Erasmus+ and a variety of other EU funding mechanisms, resources and networks, for example, the European Investment Bank.

European cooperation on Apprenticeship is also carried out through the Thematic Network Work-based Learning and Apprenticeships (NetWBL). This was launched in February 2014 and showcase results of LLP projects on work-based learning. It will support VET reforms by providing an online toolbox for policy-makers, social partners and VET providers. At the same time, it will identify gaps which could be filled by new projects developed by Erasmus+.

Within the complex process of the changing role of VET and in a changing world of work, the European Union and its Member States are faced with the question of how to place and manage their apprenticeship systems, within the education and training system, as well as in connection to the labour market. More generally, it seems to become increasingly important to understand the relevance and the role of apprenticeships as part of countries' policies for collective skills formation, in other words, as part of their human capital development strategies.

2.2. Description of the tender

2.2.1 Overall objective

The purpose of this study is to update, complete and systematise the information base on apprenticeships in Europe, including recent European Commission's studies and Cedefop's work (Thematic Country Reviews on apprenticeships, ReferNet-Cedefop articles on apprenticeships, information collected within Cedefop reporting on VET policies and systems, etc.). To this end, the study will map all existing apprenticeships in the EU Member States, plus Iceland and Norway, and will collect extensive quantitative and qualitative information in those countries where apprenticeships meet a set of pre-defined criteria characterising “apprenticeship” (paragraph 2.2.2 below). Furthermore, the study will develop a theoretical framework to classify European apprenticeship types/models.

Finally, the study will provide a tool/method for a systematic monitoring of the EAfA.

2.2.2 Subject and scope of the work

Although generally apprenticeships are relatively well-defined compared to other forms of work-based learning activities, the ways they are defined, understood and implemented vary considerably across national contexts. Several countries adopt their national official definitions of apprenticeships, i.e. what governments define as such by means of norms and minimum legal requirements.

In order to understand apprenticeships across countries, though, relying on nationally accepted definitions can lead to considerable ambiguities.

Therefore, for the purpose of this contract, and in line with Cedefop's **terminology**⁵, "apprenticeship" should have the following distinctive features:

- (a) systematic long-term training alternating periods at the workplace and in an educational institution or training centre leading to formal qualifications;
- (b) the apprentice is formally linked to the employer and receives remuneration (wage or allowance);
- (a) the employer is vested by law with the responsibility for providing the apprentice with the training at the workplace .

As a result, for parts 1 and 2 of the study (see below in point 2.3 all parts of the study), the contractor:

- will map apprenticeships in all EU Member States, plus Iceland and Norway, as defined by relevant national legislation or embedded in the VET systems. This mapping should provide a solid basis for the identification of the countries where "apprenticeship", as defined above, is in place;
- will provide an extensive description – quantitative and qualitative, using the diagnostic tool proposed by Cedefop – by compiling country fiches in those EU countries where "apprenticeship", as defined above, is in place, and in view of making a classification of apprenticeships in apprenticeship types/models.

Nota bene: The country fiches should be compiled for a minimum of 10 countries. If "apprenticeship" as defined above exists in less than 10 countries, then the countries where apprenticeships most resemble Cedefop's definition should be considered to reach the minimum number of countries.

Part 3 will cover all pledges presented under the EAfA.

2.3. Requested services and tasks

The services requested under this contract aim at providing a cross-national overview on apprenticeships, and mapping the initiatives under the EAfA.

First, the contractor should map apprenticeships in the EU Member States, plus Iceland and Norway as defined by relevant national legislation or embedded in the VET systems⁶ to provide a solid basis for the identification of the countries where "apprenticeship", as defined above, is in place.

⁵ Cedefop (2014), [*Terminology of European education and training policy: a selection of 130 terms*](#). 2nd ed. Luxembourg: Publications Office.

⁶ (Small) pilot projects which are not part of a 'systemic approach' to apprenticeships are not part of the mapping

Second the contractor will identify those countries with apprenticeships which meet the requirements of the definition in paragraph 2.2.2. If “apprenticeship” as defined above exists in less than 10 countries, then the countries where apprenticeships most resemble Cedefop’s definition, should be considered to reach the minimum number of countries.

For those countries the contractor should provide a comprehensive, exhaustive and up-to-date information base of what is in place in these countries, both quantitative (including a measurement of stocks of apprenticeships⁷) and qualitative. This work should start from the relevant legal basis and then look at the related implementing policies and practices. This information should be used to compile country fiches, which should tackle the dimensions and areas of the diagnostic tool for apprenticeships, proposed by Cedefop and to be agreed with the contractor.

Third, national apprenticeships in the identified countries (minimum 10) should be analysed and classified in a European classification of apprenticeship types/models by applying a theoretical framework developed on the basis of existing literature, in agreement with Cedefop.

Fourth, it is requested to map the (ongoing) initiatives carried out under the pledges of the European Alliance for Apprenticeships since it was launched, and develop a tool/method for its systematic monitoring.

Briefly, the work on this project will be organised in three parts:

Parts		Main tasks
1	Description	To map existing apprenticeships in the EU Member States, plus Iceland and Norway to provide a solid basis for the identification of the countries where “apprenticeship”, as defined above, is in place. To provide an up-to-date quantitative (including a measurement of stocks of apprenticeships) and qualitative description of national apprenticeships using the diagnostic tool proposed by Cedefop, for those countries which meet the requirements of the definition of “apprenticeship” in paragraph 2.2.2. If these are below 10, then other countries where apprenticeships most resemble Cedefop’s definition, should be considered to reach the minimum number of countries.
2	Analysis	To analyse national apprenticeships falling under the definition of “apprenticeship in paragraph 2.2.2” (minimum 10) in order to classify apprenticeship types/models in Europe.
3	Mapping	To map the ongoing initiatives under the European Alliance for Apprenticeships and propose a tool/method for systematic monitoring.

Part 1: Description

⁷ Where information on stock of apprenticeships is not available, a proxy measure will be derived as the product of the inflow and the average length of stay.

The goal of the first part is to have an overview of apprenticeships in the EU Member States, plus Iceland and Norway, identify in which countries “apprenticeship” exists according to the definition in paragraph 2.2.2 and carry out an extensive description of apprenticeships in these identified countries.

To this end, the contractor will be asked, first, to map apprenticeships as defined by relevant national legislation or embedded in the VET systems⁸ in all EU Member States, plus Iceland and Norway. The mapping of apprenticeships should provide a solid basis for the identification of the countries where “apprenticeship”, as defined above, is in place and may include such information which falls under dimensions of the diagnostic tool proposed below.

Second, on the basis of the information collected in the mapping exercise, the contractor will be asked to identify those countries where apprenticeships meet the requirements of the definition of “apprenticeship” in paragraph 2.2.2. If “apprenticeship” exists in less than 10 countries, then the countries where apprenticeships most resemble Cedefop’s definition, should be considered to reach the minimum number of countries.

Third, the contractor should discuss and revise the diagnostic tool provided by Cedefop. This tool should serve to systematically describe the apprenticeships corresponding to the definition of “apprenticeship” in view of (i) a better understanding of similarities and differences, and (ii) a classification of apprenticeships types/models, according to a theoretical framework. The proposed tool comprises the following dimensions and areas:

Dimensions	Areas
A) Legal, organisation and governance structures	1. Legal basis
	2. Status of apprentices
	3. Place in the education and training system
	4. Allocation of strategic and operational functions and governance structure (including involvement and role of social partners, labour market responsiveness, and so forth).
B) Implementation	5. Standards, curricula, qualifications
	6. Off- and on-the-job training organisation
	7. Learning outcomes and final assessment
	8. Learning venues: accreditation and co-operation
	9. Requirements for and support to teachers and trainers
c) Financing	10. Cost-sharing mechanisms
	11. Funding for training
	12. Financial and non-financial support/incentives to companies

⁸ (Small) pilot projects which are not part of a ‘systemic approach’ to apprenticeships are not part of the mapping

The study should use the diagnostic tool, finalised in agreement with Cedefop, to describe those apprenticeships in the countries previously selected (minimum 10 countries), by compiling country fiches. These fiches should provide an updated description encompassing both quantitative (including a measurement of stocks of apprenticeships⁹) and qualitative aspects, starting from the relevant legal basis, and then looking at the related implementing policies and practices, according to a template agreed with Cedefop.

Part 2: Analysis

Part 2 of the work relies on existing literature from different disciplines, including labour economics, comparative politics and sociology of work and VET studies. The goal of this part of the work is to propose a classification of apprenticeship types/models to help understand similarities and differences among countries.

First, a review of the existing literature should present some possible classifications for apprenticeship types/models.

Second, having clarified the theoretical approach adopted, one classification should be proposed and described, which possibly innovates or updates existing types/models.

Third, using the information collected during part 1, the apprenticeships considered within the study (falling under the “apprenticeship” definition in paragraph 2.2.2) should be analysed and organised in such a classification.

Part 3: Mapping of the European Alliance for Apprenticeships

This part of the work aims at mapping the ongoing initiatives within the European Alliance for Apprenticeships (EAfA).

As an outcome, the contractor should provide a repository of the initiatives under the EAfA pledges.

This mapping should also set the basis for future systematic monitoring of such initiatives. To this end, the contractor is required to propose relevant tool/method.

⁹ Where information on stock of apprenticeships is not available, a proxy measure will be derived as the product of the inflow and the average length of stay.

2.4. Reports

2.4.1 Reporting requirements per work assignment

The following reports, all in English, will be required:

(a) Inception report

A draft of the inception report is due 4 weeks after the entry into force of the service contract and it should include:

- The fine-tuned methodology including:
 - a first proposal for the revised diagnostic tool;
 - the template for the mapping of apprenticeships in the EU Members States, plus Iceland and Norway (indicating the information that will be collected);
 - the template for country fiches for the countries where “apprenticeship” according to the definition in paragraph 2.2.2 exists and, if the case be, where it most resembles Cedefop’s definition;
 - a description of envisaged data and literature sources to be used;
- A revised work plan and timing.

Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop’s project managers and provide the final inception report.

(b) First interim report

A draft first interim report will be submitted 6 months after the entry into force of the service contract and it will include:

- the finalised diagnostic tool;
- the mapping of apprenticeships in all EU Member States, plus Iceland and Norway as apprenticeships as defined by relevant national legislation or embedded in the VET systems;
- the country fiches compiled for the relevant countries (minimum 10).

Cedefop will provide comments on the first interim report. The Contractor should address those comments, liaising closely with Cedefop’s project manager(s) and provide the final first interim report.

(c) Second interim report

A draft of the second interim report will be submitted 10 months after the entry into force of the service contract and it will include:

- A review of the literature about classifications of apprenticeship types/models;
- A first draft classification of apprenticeship types/models;
- A draft structure of the repository of EAfA initiatives.

Cedefop will provide comments on the second interim report. The Contractor should address those comments, liaising closely with Cedefop’s project manager(s) and provide the final second interim report.

(d) Final report

A draft of the final report will be submitted 12 months after the entry into force of the service contract and will include:

- The final classification of apprenticeship types/models;
- The compiled repository of policy initiatives under the EAfA pledges;
- A proposal for a tool/method to monitor the EAfA initiatives.

The draft will be discussed with Cedefop during the final meeting.

Cedefop will provide comments on the final activity report. The Contractor should address those comments, liaising closely with Cedefop's project manager(s) and provide the finalised final report.

2.4.2 Submission & approval of reports

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

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

The selected Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (the table in point 5.4, item 2c). The reports have to comply with Cedefop style manual attached in Annex H.

2.5. Meeting and Travel Expenses

2.5.1 The expert(s) (**minimum 2**) responsible for the co-ordination of the study on behalf of the contractor will be requested to attend the following **one-day meetings at Cedefop premises (in Thessaloniki)** with the project manager(s) responsible.

- (a) an **inception meeting** to take place approximately 5 weeks following the entry into force of the service contract to discuss the inception report, with special attention to the diagnostic tool, and in general to fine-tune the final planning of the activities and relative timing;
- (b) a **first interim meeting** after the delivery of the first interim report to discuss the mapping of apprenticeships in all EU Member States, plus Iceland and Norway, and the compilation of country fiches for the relevant countries (minimum 10) and to start envisioning the classification of apprenticeships types/modes;
- (c) a **second interim meeting** after the delivery of the second interim report to discuss the proposed classification of apprenticeships types/models and the draft structure of the repository of EAfA initiatives;
- (d) a **final meeting** to take place after the first draft of the final report, to discuss the finalised classification of apprenticeship types/models and ideas for the tool/method to monitor the EAfA initiatives.

All costs foreseen, including travel & accommodation are to be included in the financial offer (see table in point 5.4 - item 2a).

2.5.2 Travel expenses related to the field of work activities

The contractor is to define the methodology and as such the field work activities necessary to perform the tasks. All travel expenses related to the field work activities have also to be included in the financial offer (see table in point 5.4 - item 2b).

2.5.3 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).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the Declaration on Exclusion Criteria and absence of conflict of interest given in Annex C. Therefore all tenderers, all group (consortium) members (if any) and any subcontractor/s, (identified as per the two bullet-points in the fifth paragraph of point 4.2 below) must provide the self-declaration found in Annex C duly signed and dated. The exclusion criteria will be assessed in relation to each company individually.

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

In the event of recommendation for contract award, point j) of Annex C will apply.

3.2. Selection criteria

The selection criteria concern the tenderer's capacity to execute similar contracts. The tenderers must submit documentary evidence (or statements, where required) of their economic, financial, technical and professional capacity to perform this contract.

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

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

3.2.1 Economic and Financial capacity

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

Requirement:

- The average annual turnover (invoiced financial value) of the tenderer for the last **three (3)** financial years concerning socio-economic research and/or policy analysis should be at least **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 on socio-economic research and/or policy analysis during each of the last 3 (three) financial years.

In the case of a consortium (grouping) or subcontracting each member of the consortium and all sub-contractors (in line with points 4.1 or 4.2 below) must provide the required statement for the economic and financial capacity (Questionnaire 2 in Annex G), **but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.**

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

If, for some exceptional reason the tenderer is unable to provide one or more of the above documents, he is required to justify the non-provision and may prove his economic and financial capacity by any other document which Cedefop considers appropriate.

Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2 Technical and professional capacity

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

Requirements

- The tenderer must have adequate experience in the field of international and comparative research on vocational education and training and/or apprenticeships, having performed contracts with a total minimum contract value of 300,000€ (invoiced financial value) during the last three (3) years.
- The Tenderer's Core team of experts, who will be proposed to implement the contract, must have the relevant knowledge and experience for its successful implementation. In particular, the team must comply with the following minimum requirements:
 - Team leader (1 member) – University degree in social sciences with at least:
 - 6 years of experience in research and/or policy analysis on vocational education and training and/or apprenticeships, at EU or international level;
 - 5 years of experience in international research projects' management;
 - Scientific advisor (1 member) – University degree in social sciences with at least 5 years of experience in scientific research on vocational education and training and/or apprenticeships, at EU/international level;
 - Senior international experts (maximum 5 members):
 - University degree in social sciences with at least 3 years of experience at EU/international level in research projects and/or policy analysis on vocational education and training and/or apprenticeships.

- at least 2 senior international experts should prove at least 2 years of experience at EU/international level in research projects and/or policy analysis on apprenticeships.
- Junior international experts (maximum 5 members):
 - University degree in social sciences with at least 2 years of experience at EU/international level in research and/or policy analysis on vocational education and training and/or apprenticeships.

All experts should be able to speak and write in English at Level C1 of the Common European Framework of Reference for Languages¹⁰. The language skills have to be attested by the CVs of the experts proposed.

Proofs / Evidences of Technical and Professional capacity

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

- (a) Brief presentation of the Tenderer, demonstrating the required experience in EU/international and comparative research on vocational education and training and/or apprenticeships (please fill-in Questionnaire 4 in Annex G);
- (b) List of contracts performed in the past three (3) years in the field of EU/international and comparative research on vocational education and training and/or apprenticeships. The list shall describe the contracting authorities, the subjects, the dates, the overall budget and the percentage of the overall contract performed by the tenderer (please fill-in Questionnaire 3 in Annex G);
- (c) Brief description of the composition of the team by filling-in the table below:

Name	Institution	Role in the team	Relevant expertise (briefly)

- (e) The Europass curriculum vitae format (<http://europass.cedefop.europa.eu>) or similar format shall be submitted for each person involved in the execution of the tasks foreseen in the tender. CVs must clearly specify the role of the expert in the team (Team Leader, Scientific Advisor, Senior International Expert, Junior International Expert) and his/her expertise relevant for the purposes of the proposed contract.

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).

¹⁰ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

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**. 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 35 countries, namely: the 28 EU Member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (FYROM, Albania, Montenegro and Serbia).

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

the tenderer should submit with the offer:

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

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

5. AWARD OF THE CONTRACT

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender that offers the best-value-for-money as represented by the highest Total Score (TS) out of 100.

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

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

Whereby:

TQV = Total Quality Value of the tender, obtained as per point 5.2;

TFO = Total Financial Offer of the tender (as per point 5.3 and 5.4);

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

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

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

5.1. Technical proposal

As specified in section 1.1 above, Cedefop will offer to the selected tenderer a service contract to be carried out over a period of maximum 14 months.

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

Tenderers are requested to organise the technical proposal in headings or to structure it in such a way so as to ensure that the content of the technical proposal meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria. It is up to the tenderer to organise his proposal in the way he considers most suitable to show his capacity to fulfil (comply in full to) all requirements outlined in the Terms of Reference.

The tenderers are, however, expected to develop the 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 ToR).
2. Rationale of the project
 - 2.1. A concise discussion of the subject demonstrating in-depth understanding of the importance of the topic of apprenticeships, “apprenticeship” at the European level, including the European Alliance for Apprenticeships initiative;
 - 2.2. comments on the Terms of Reference and key issues to the achievements of expected results;
 - 2.3. assumptions and risks.
3. Methods and tools
 - 3.1. general approach to applying the diagnostic tool throughout the descriptive phase;
 - 3.2. methods and tools for data collection and sources of information, to map apprenticeships and to describe the ones in the selected countries (minimum 10);
 - 3.3. approach to analyse and classify apprenticeship types/models within a consistent theoretical framework;
 - 3.4. methods and tools to collect information about EAfA initiatives, and proposal for systematic monitoring.
4. Project management, work organization and team work.
5. Quality assurance and risk management.
6. Organization of the work process.

The length of the Technical Proposal to be submitted is **maximum 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.

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

The tenderer shall identify a Project Manager within 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.

5.2. Technical evaluation

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the tender specifications – indications in italics below refer to the framework template as described in point 5.1 above. The following Award Criteria for the technical evaluation will be applied to this tender procedure:

Award criteria – Evaluation grid	Maximum number of points
1) UNDERSTANDING AND METHODOLOGY <i>Points 2 and 3 of the framework template in section 5.1.</i>	70
1.1. Rationale of the project: In-depth understanding of the importance of the topic of apprenticeships, “apprenticeship” at the European level, including the European Alliance for Apprenticeships initiative. Ability to make reference both to scientific literature and to policy-level documents. <i>Point 2 of the framework template in section 5.1</i>	15
1.2. Method and tools <i>Point 3 of the framework template in section 5.1.</i>	55
(a) general approach to applying the diagnostic tool throughout the descriptive part;	10
(b) methods and tools for data collection and sources of information to map apprenticeships and to describe the ones in the selected countries (minimum 10), considering also their accessibility and feasibility, for example access to an international network dealing with vocational education and training and/or apprenticeships covering the 28 EU member states, plus Iceland and Norway;	18
(c) approach to analyse and classify apprenticeship types/models within a consistent theoretical framework;	15
(d) method and tools for information collection about EAfA initiatives, considering also their accessibility and feasibility, and proposal for systematic monitoring.	12
2) ORGANISATION, PROJECT MANAGEMENT AND STAFF ALLOCATION	30
2.1. Project management, work organization and team work (reporting; function and role of the team leader; scientific advisor; management structure; distribution of tasks among experts). <i>Point 4 of the framework template in section 5.1.</i>	10
2.2. 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 5.1.</i>	5
2.3. 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 5.1.</i>	15
OVERALL TOTAL SCORE (Total Quality Value - TQV)	100

5.3. Financial evaluation

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

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

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

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

Information concerning price

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

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 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 5.3 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 20%.

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.

5.4. Financial proposal / Financial Scenario

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities indicated in the Terms of Reference.

The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5).

Price schedule table

1)	Names / positions of the Experts	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending <u>four 1-day meetings</u> (2 persons), in Thessaloniki (see point 2.5.1)	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks (see point 2.5.2)	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommodation, etc.
	2c) Other administrative expenses including professional proof-reading and editing in English of final report (see point 2.4.3)	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+2b+2c)				
3)	Total Price (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2			

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

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

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

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 exclusion criteria declaration requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 4 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

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

6.3. Envelope C – Financial proposal

One original signed unbound version and three bound copies of:

- the Financial Proposal containing all information requested in point 5.4.

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

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

(Given as separate file in *.doc)

ANNEX D

LEGAL ENTITY FORM

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

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

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

ANNEX E

FINANCIAL IDENTIFICATION FORM

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

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

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

PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

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	
Envelope 'A' must contain				
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	☐	☐	
- Exclusion Criteria Declaration (including those of consortium members and subcontractors, if applicable)	3.1, 6.1 & Annex C	☐	☐	
- selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1-4 (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	☐	☐	
Envelope 'B' must contain				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.1, 5.2, 6.2	☐	☐	
Envelope 'C' must contain				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4, 6.3	☐	☐	

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 to 4

(Given as separate files in *.doc)

ANNEX H

Cedefop Style Manual

(Given as 2 separate pdf files)

ANNEX I

MODEL 1 & 2- POWER OF ATTORNEY

(Given as separate files in *.doc)

ANNEX J

Model of Letter of Intent for Subcontractor/s

Given as separate file in *.doc)