

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

FINANCE AND PROCUREMENT

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Thessaloniki, 04 March 2013

OPEN INVITATION TO TENDER

AO/ECVL/ADEHM-GUTCH/Work-based learning in CVET/002/13**“Work-based learning approaches in continuing vocational education and training in Europe: practices and policies”****REFERENCE: Ref.: Contract notice – 2013/S 043-067692 of 01/03/2013**

Dear Sir/Madam,

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

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

1. Tenders 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:

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

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

Do not attach your offer to any of the above information 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)**):

**European Centre for the Development of Vocational Training
(Cedefop),
Procurement Service
Attention of Mr G. Paraskevaïdis
123, Europe Str, GR-57001 Thessaloniki-Pylea,
PO Box 22 427 - Greece
Tel: +30 2310 490111 / 490 064**

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

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

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

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

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

<p style="text-align: center;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/ECVL/ADEHM-GUTCH/Work-based learning in CVET/002/13</p> <p style="text-align: center;">“Work-based learning approaches in continuing vocational education and training in Europe: practices and policies”</p> <p>Name of tenderer:</p> <p style="text-align: center;">NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>

The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in point 6 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible. It is mandatory to include in the offer a cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure (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:

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 fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Requests for additional information/clarification should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

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

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

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.
- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the tenders have been opened.

- If the 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. The tenderers' replies must serve solely the purpose to provide the Evaluation Committee with a clarification regarding the offer in relation to the technical proposal or concerning obvious clerical errors in the financial offer. Neither the technical content of the tender nor the financial offer may be changed.
- In case the tenderer alters the total financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	05/04/2013	< N/A >
Last date on which clarifications are issued by Cedefop	As soon as possible	< N/A >
Deadline for submission of tenders (hand delivered)	15/04/2013	< 17.00h >
Deadline for submission of tenders by post / courier	15/04/2013	< N/A >
Validity of the tenders	15/10/2013	< N/A >
Tender opening session	25/04/2013	11.00h

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

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

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

10. All costs incurred in preparing and submitting tenders are 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 signature of the contract with the successful tenderer.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address

and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

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

Yours sincerely,

G. Paraskevaidis

Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/ADEHM-GUTCH/ Work-based learning in CVET/002/13

Work-based learning approaches in continuing vocational
education and training in Europe: practices and policies

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 provides the European Commission, Member States¹ and social partners with insights into trends concerning VET and offers advice on how European VET policy should meet the challenges Europe and its citizens.

The evidence Cedefop provides comes from its:

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

CEDEFOP'S OBJECTIVE AND PRIORITIES FOR 2012-14

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

• **Supporting modernisation of VET systems**

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

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

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

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 jobs' requirements.

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

CEDEFOP'S INFORMATION

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year. Cedefop also coordinates the study visits programme for the European Commission. Study visits are short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning.

In addition to its web portal 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

In submitting his tender, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale may be, which he hereby waives. Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a tender containing all the required information and documentation may lead to the rejection of the tender. No account can be taken of any reservation expressed in the tender as regards the tender dossier (if necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender); any reservation may result in the immediate rejection of the tender without further evaluation.

1.1 Description and type of the contract

- a) Title of the contract: Work-based learning approaches in continuing vocational education and training in Europe: practices and policies
- b) Short description of content of this contract: To provide a description of the landscape of work-based learning in CVET in Europe; and to identify priorities and insights for effective VET policies and systems to address their needs in terms of demand for and supply of work-based learning. To this end, the contract includes 3 work assignments, namely: 1) the landscape of work-based learning in CVET; 2) needs, challenges and priorities for work-based learning policies and systems; 3) validation of results and policy recommendations.
- c) Type of contract: Service Contract (Study Contract related to research)

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.

1.5 Value or quantity of purchase

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

1.6 Duration of the contract

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

1.7 Main terms of financing and payment

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

2 TERMS OF REFERENCE

2.1 Background information

Work-based learning and CVET are raising increased interest in Europe. As components of adult learning, they are concerned with the European benchmark according to which 'By 2020, an average of at least 15 % of adults (between 25 and 64) should participate in lifelong learning' (Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training ('ET 2020')). In the Bruges Communiqué (2010), one of the short-term deliverables is to encourage participation in CVET to contribute to that benchmark. Work-based learning in particular is the object of a clear, repeated and marked interest, and presented as a source of personal and professional development, and social cohesion.

Work-based learning and CVET are all the more important as they appear as a possible way for addressing the challenges raised by the current social and economic context. These challenges are many. The economic crisis, first, calls for reinforced competitiveness, innovation and growth public policies, and appropriate firm strategies. The changing technologies and work organisation along with an increasing demand for green activities and care and household services, then, require new skills. Finally, the demographic changes make it necessary to develop employability and extend working life. In summary, lifelong learning, adult learning, CVET and in particular work-based learning are seen as a possible source of human capital development, employability, adaptability, career management mastery and innovation capacity at individual level. At enterprise's and country's levels, they also appear as a promising way worth to explore for possible gains in terms of innovation, competitiveness, growth and social cohesion.

However, work-based learning in CVET has been insufficiently studied so far. Though numerous examples of practices as well as several specific studies may be found, a systematic and comprehensive knowledge of the field is lacking. The available knowledge on work-based learning to date is fragmented and sparse, while a consistent and complete set of information is necessary for well-founded decision- and policy making in the field. In addition, Europe's CVET landscape is very heterogeneous, not only because CVET is differently defined in different countries, but especially because it depends, much more than IVET, on the country context: e.g. economic structure in terms of sectors and size of companies, diversity of jobs denoted by the same occupational code, how occupations and qualifications are designed, how access to occupations or functions is regulated, etc.

Cedefop has engaged in analysing work-based learning in CVET. In the recent period, four major works on that topic have been performed.

First, Cedefop study *Employer-provided vocational training in Europe* (2010) provides a detailed comparative analysis of the results of the third European

continuing vocational training survey (CVTS3), and analyses national CVT performance in incidence, participation, intensity and expenditure, as well as policy and management of continuing training in enterprises. It shows that training provision varies considerably in the different member states, and that professional management of training, involvement of social partners and targeted public measures are crucial to fostering training. It also reveals gaps in enterprises' perception of skills and training needs.

Second, in 2011, Cedefop published a report *Learning while working – Success stories on workplace learning in Europe*. Based on examples from policies and practices in the field of adult learning, this report outlined the need for public policies to complement their provision of financial incentives with actions in terms of skills needs assessment and awareness-raising at enterprise and sector level. The report also emphasised the need for enterprises to take better account of the learning dimension of work organisation and of the key competences (not only the occupation-specific skills) in their strategies, and to better integrate low status jobs and low qualified employees in the training provision. Unions also were recognised a role in developing a culture of lifelong learning in the workplace, helping workers develop transferable skills, and developing guidance and learning services. Last but not least, trainers were called for going beyond just conveying vocational knowledge and, further, develop their support to workers in learning within work practice, aid learning processes, and stimulate learning capacities.

Third, in the study titled *Learning and innovation in enterprises* (2012), the focus was on the interactions between work-based learning and innovation. More specifically, that study unveils significant positive correlations between learning-intensive forms of work organisation, work-based learning and innovation performance, at least at country level. Countries showing higher levels of learning-intensive forms of work organisation and work-based learning tend to rank higher in innovation performance. The results suggest that task complexity and human capital formation in enterprises are two major driving factors of innovation performance.

Fourth, another Cedefop study analyses the role of work-based learning in the reintegration of unemployed adults into the labour market (*Return to Work – Work-based learning and the reintegration of unemployed adults into the labour market*, 2012). Accent here was put on how work-based learning, focusing on the acquisition of key competences, can effectively help tackling the difficulties faced by low-skilled unemployed adults in Europe. The study showed that work-based learning is an effective intervention for low-skilled people in that its direct connection to employment opportunities has a strong motivating effect; work-based learning helps tackling deficiencies in working habits and behaviours; and it finally offers an alternative to those people who have had negative learning experiences at school.

The study to be carried out under the present call for tenders should build upon the above outcomes and take them forward.

Box 1 - Main definitions

CVET

Continuing vocational education and training is specifically targeted at equipping adults with knowledge, know-how, skills and/or competences in the perspective of improving or updating their abilities; preparing them for a career move or retraining; and helping them to continue their personal or professional development.

Learning by doing

Learning-by-doing, also called *experiential learning*, is the general process in which individuals construct their knowledge/skills/competences through experimenting, reflecting, drawing conclusions, applying and adjusting these in light of reality. From a conceptual standpoint, CVET and learning-by-doing are two different things. On the one hand, a CVET programme might comprise only passive learning activities (i.e. lecturing) thus having no link with learning-by-doing. On the other hand, learning-by-doing can be used not only in CVET but also beyond, i.e. in general and technical education as well as in initial vocational education and training, and hence has no necessary link with CVET.

Work-based, work-place, work-related learning

Work-based learning, also called *work-related learning*, encompasses any form of learning in a continuum of learning settings which goes from the simplest form of unstructured and unintentional informal learning up to the most elaborated forms of formal learning where lecturing and work-related practice are combined. Work-based learning is called *workplace learning* or *on-the-job learning* if any of its components (most often the work-related practical activities) takes place within the workplace. It is called *off-the-job learning* otherwise. Work-based learning is a form of learning-by-doing but the two concepts are distinct since learning-by-doing can be used outside the field of work-based learning, e.g. when active pedagogy is used at primary education. Work-based learning can be used in CVET, but from a conceptual viewpoint, CVET does not necessarily entail work-based learning activities. For example, a programme targeted at teaching the basics of reading and writing to illiterate unemployed adults might comprise no work-related learning activity. Note: In this study, the types of work-based learning to be investigated only include intentional, planned and structured learning activities linked to the workplace and addressing adults in employment.

2.2 Objectives and purpose

2.2.1 Overall objective

The overall objective of this Cedefop project, of which the contract under the current tendering procedure is a part, is to improve the understanding of policies and practices of work-based learning in CVET (WBL-CVET) in Europe. For each of the work-based learning types, sectors, and countries included in the scope of

the project, the analysis should define main features of WBL-CVET, common elements and differences as well as the strong and weak points so as to identify trends and challenges that can inform policy-making.

2.2.2 Purpose of the contract

Combining quantitative and qualitative approaches and methodologies, the contractor is requested to investigate WBL-CVET in Europe, and to provide insights for effective VET policies.

In particular, the purposes of this contract are as follows:

- analyse the political, institutional, organisational and statistical landscape of WBL-CVET in Europe and with a focus on a limited number of European countries and sectors, identifying main trends, challenges and policy developments;
- investigate the demand and supply of WBL-CVET and identify challenges and priorities so as to ensure that VET policies and systems can respond more directly to the needs expressed by businesses and workers;
- identify the conditions and strategies to be put in place for designing efficient and effective WBL-CVET (e.g. in terms of skills development, learning process, employability) and provide policy and practice recommendations.

2.3 Scope of the work

2.3.1 Study description and country coverage

Depending on the purposes of the analysis, different settings for work-based learning can be analysed. On the basis of four main criteria which can be used for characterising adult learning, Table 1 below presents the range of possible settings types for WBL-CVET.

Table 1 - Types of work-based learning settings in CVET

		Instructional strategy in terms of distance to core work		
		Off-the-job learning	On-the-job learning	
			Through work tasks combined with training	Through work tasks only
Degree of formality	Formal*	Type A (e.g. tertiary CVET programmes for returning adults)	Type B (e.g. the <i>Congé individuel de formation</i> in France; <i>accreditation of prior and experiential learning</i> – APEL – procedures for access of employed people to higher education programmes)	
	Non-formal**	Type C (e.g. retraining CVET courses for the unemployed)	Type D (e.g. coaching, seminars/workshops/conference attendance)	Type E (e.g. project work)
	Informal	Type F/G*** (e.g. providing public internet access, leisure activities)		Type H/I*** (e.g. interpersonal interactions, participation in Quality circles)

* Settings with an educational purpose, a structured learning process, and formal certification procedures

** Settings with a structured learning process (though without any formal certification) and an educational purpose

*** Settings without any structured learning process but with an educational intention and/or settings without any structured learning process and having no educational intention

Given the purposes of this project, the tenderer must consider that:

- The **types of learning** to be investigated in the study **only** include intentional, planned and structured learning activities linked to the workplace and addressing adults in employment (types A, B, C, and D in Table 1). The unemployed are out of the study's scope.
- In terms of **enterprise sizes**, only the medium-sized enterprises (50-249 employees) belong to the scope of the study.

As for **sectors and country coverage**, the general scope of the study covers all economic sectors and all EU 27 Member States plus Norway and Iceland. However, in-depth analysis and surveys provided by the study should be carried out on a selected number of countries and sectors to be identified by the tenderers on the basis of the criteria provided in the following section (2.3.2).

2.3.2 Specific activities

The study is divided into **three work packages**, namely: 1) the landscape of WBL-CVET; 2) needs, challenges and priorities for work-based learning policies and systems; 3) validation on results and policy recommendations.

Activities are to be structured as follows for each selected sector and country as appropriate.

Work Package 1: The landscape of work-based learning in CVET

A. Objectives

The aim of WP1 is to provide an overview of the types of WBL used in CVET and their main features, and a description of the political, institutional and statistical landscape of WBL-CVET, including a presentation of how WBL-CVET practices and policies are implemented (the organisational landscape). The study will be conducted in a selected number of European countries (**min. five countries**) that shall be proposed and duly justified by the tenderer in his technical proposal. Specifically, must be represented in the selected countries:

- Countries with high and low levels of CVET/WBL;
- Countries with different governance of CVET systems and/or different labour market features;
- Smaller and bigger countries (possibly with different geographical locations).

WP1 should provide an in-depth overview and identify main trends for all the aspects considered in the analysis, and analyse on-going policy developments.

B. Task and expected outcomes

This work package should help improve the understanding of WBL-CVET and of the context in which employers and training providers operate their work-based learning activities in the selected countries, through:

1. Statistical mapping of the demand for and supply of WBL-CVET: users (learners, firms, etc.) and providers (educators, training organisations, etc.) by economic sector, types of firms, etc.
2. Overview of policy framework within which WBL-CVET operates in the selected countries: history; values and objectives; governance; strategies and programmes, resources involved, recent reforms and policy development, etc.
3. Analysis of roles and responsibilities of public and private stakeholders in WBL-CVET (social partners, public institutions, etc.) at the national, regional, and sectoral levels, as well as identification and analysis of the WBL-CVET providers.
4. Analysis of the institutional forms/types/patterns/settings of WBL-CVET providing a description of the main features and functioning. These forms may be set on a regulatory basis (e.g. based on labour law or on education and training laws), as well as stem out from practice without any prior regulatory basis. The key characteristics (learning environments, role of educators, etc.) of these forms/types/patterns/settings will also be presented.

C. Working methods

- Desk: statistics, existing surveys or ad hoc studies, literature analysis (including relevant scientific literature), policy documentation, etc.
- Field: in-depth interviews (semi-structured) with a selected number of well-informed actors involved in WBL-CVET (employers and trade unions organisations, adult learning organisations, learning providers, chambers of commerce, policy makers, experts, etc.).

Work Package 2: Needs, challenges and priorities for work-based learning in CVET

A. Objectives

The tenderer is required to conduct **two surveys** by employers and training providers aimed at providing an in-depth analysis of the demand for and supply of work-based learning in CVET in the selected countries. The surveys will be conducted on a limited number of sectors (**min. five sectors**, one different sector in each of the selected countries) that shall be proposed and duly justified by the tenderer in his technical proposal. Specifically, must be represented in the selected sectors:

- Sectors with high and low levels of CVET/WBL;
- Sectors with different governance of CVET systems and/or different labour market features;
- Sectors which can ensure the maximum policy relevance of the project to the 'Rethinking Education'² and the 'Employment Package'³ Commission's Communications.

B. Task and expected outcomes

WP2 is devoted to develop and implement two surveys on a sample of employers/HR managers and a sample of training providers in order to collect their views and information on WBL-CVET. To this end, the tenderer is required to carry out the following tasks:

- I. Questionnaires design;
- II. Testing and revision of questionnaires through a limited number of in-depth exploratory interviews;
- III. Surveys implementation on a sample of employers/HR managers and a sample of training providers;
- IV. Analysis of results.

It is up to the tenderer to propose the content and the structure of questionnaires in line with the project aims and objectives. However, the surveys on employers/HR managers and learning providers should be able to collect their views and provide insights at least on the following issues:

² See: <http://www.cedefop.europa.eu/EN/news/20678.aspx>.

³ See: <http://www.cedefop.europa.eu/EN/news/19938.aspx>

- Learners involved (characteristics, participation rates over the last years, etc.);
- Key challenges in demanding and/or delivering WBL-CVET;
- On-going changes in WBL-CVET;
- Future trends in shape and structure of WBL-CVET demand and provision;
- Opportunities for work-based learning to make a difference also depending on different context conditions (sectoral, organisational, etc.);
- Trends in the institutional provision of WBL-CVET;
- The priorities which VET policies and systems should address for accommodating their needs.

The final questionnaires to be used for the surveys will be defined in agreement with Cedefop also taking into account the results of the above mentioned exploratory interviews.

However, the questionnaires should comprise at least the four following sections.

	Employers survey	Learning providers survey
A. Provision of WBL-CVET	<ul style="list-style-type: none"> • Current nature of WBL-CVET providers • Current and recent provision of WBL-CVET (by WBL type and their main features) 	<ul style="list-style-type: none"> • Current nature of clients of WBL-CVET (by sectors and firms type) • Current and recent provision of WBL-CVET (by WBL type and their main features)
B. Needs and challenges	<ul style="list-style-type: none"> • Adequacy of current WBL-CVET provision • Barriers to employer engagement with WBL-CVET • Anticipated changes in demand of WBL-CVET • Issues affecting future demand of WBL-CVET 	<ul style="list-style-type: none"> • Employers' needs and use of WBL-CVET • Barriers to employer engagement with WBL-CVET • Adequacy of current supply of tutors and trainers for WBL-CVET • Issues affecting future demand of WBL-CVET
C. Opportunities and conditions for effective WBL-CVET	<ul style="list-style-type: none"> • In which cases WBL-CVET proved to be a better solution than other forms of CVET for skills development, learning, employability, etc. • What conditions make a difference for WBL-CVET to be as effective as possible 	<ul style="list-style-type: none"> • In which cases WBL-CVET proved to be a better solution than other forms of CVET for skills development, learning, employability, etc. • What conditions make a difference for WBL-CVET to be as effective as possible
D. Priorities for policies and systems	<ul style="list-style-type: none"> • What are the priorities which VET policies and systems should address for accommodating the expressed needs and the identified challenges 	<ul style="list-style-type: none"> • What are the priorities which VET policies and systems should address for accommodating the expressed needs and the identified challenges

C. Working methods

- Exploratory interviews: face-to-face
- Surveys on a sample of employers/HR managers and training providers: telephone or on line

Work Package 3: – Analysis and validation of results and policy recommendations

A. Objectives

The aim of WP3 is to analyse and validate outputs and outcomes from the analysis (WPs 1 and 2), and formulating policy and practice recommendations.

B. Task and expected outcomes

The tenderer should develop as appropriate qualitative approaches to validate the results of WPs 1 and 2 and draw implications for WBL-CVET development in Europe and, as appropriate, propose recommendations for policy makers.

C. Working methods

Qualitative methodologies (e.g. desk research, interviews or meetings with selected stakeholders, focus groups, Delphi method).

2.4 Reports

2.4.1 Reporting requirements

The Contractor shall submit the following reports in English:

- Inception report: within 1 month of the signature of the contract;
- Draft interim report: within 3 months of the signature of the contract;
- Final interim report: within 5 months of the signature of the contract;
- Draft final report: within 10 months of the signature of the contract;
- Final report and synthesis report: within 12 months of the signature of the contract.

1) Inception report

An **inception report** outlining the methodology, inputs and expected outputs and outcomes of the study, process and timetable of the research is due **one (1) month** after the date on which the contract is signed by the last contracting party. The inception report should also be the basis for the final selection and agreement with Cedefop of countries and sectors to be investigated. The inception report shall also provide a draft outline structure of the final *synthesis*

report. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

2) Draft interim report and interim report

A **draft interim report** is due **three (3) months** after the date on which the contract is signed by the last contracting party. It will present the draft results of **WP1** (The landscape of work-based learning in CVET), along with interim findings, problems encountered, the impact on future work, and a detailed timetable for the completion of further work. The draft interim report will also propose the questionnaires, the underlying rationale and the whole strategy for the surveys of WP2. Following comments by Cedefop and liaising closely with Cedefop's project manager, a **final interim report** should be delivered **five (5) months** following the signature of the contract.

3) Draft final report

The **draft final report, including all results and findings from WPs 1, 2, and 3** must be delivered within **ten (10) months** of the date on which the contract was signed by the last contracting party. The following elements should be included: executive summary; description of methodology; presentation of findings; conclusions and recommendations and, in annexes, questionnaires used for WP1 and WP2, a list of the literature reviewed and statistical sources used as well as a full set of data and other relevant information. Cedefop reserves the right to ask for any background data, and evidence of computations and the quantitative models used in the analysis carried out by the contractor. Cedefop will provide comments on the draft final report. The Contractor should address those comments, liaising closely with Cedefop's project manager.

4) Final report

The **final report, and the synthesis report (the latter of around 80 pages)** summing up the outcomes of the analysis and defining policy recommendations for future actions, must be delivered within **twelve (12) months** of the date on which the contract was signed by the last contracting party. Payment of the balance is conditional on Cedefop's acceptance of a revised final deliverable. The reports must be written in English. The Contractor must submit all reports and deliverables in hard copy and on CD-ROM or by e-mail as an MS Word document. Figures, tables, databases and possible scenario analysis simulation model should also be delivered separately as MS Excel or Word documents, as appropriate. Excel charts must contain the data used for the charts (in separate worksheets) so that they can be reproduced. Electronic files must correspond exactly to the hard-copy version. Cedefop reserves the right to ask for any background data (including interview-transcripts and other raw-data collected in the surveys), and evidence of computations and the quantitative models used (if any) in the analysis carried out by the contractor. Also, the contractor will provide assistance (e.g. drafting, proof reading, text editing, etc.) in the preparation of

communication materials (e.g. publication of a synthesis report, briefing notes, etc.).

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 all 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 5.3, item 2c). Lay-out and format of the text – in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (Annex H).

2.5 Meetings and travel expenses

The Contractor will be requested to attend the following meetings at Cedefop with the project managers responsible:

1. A one-day kick-off meeting a few days after the signature of the contract to fine-tune the study methodology in view of the preparation of the inception report. On request of the one party and in agreement with the other, the kick-off meeting may also be held via teleconferencing;
2. An **inception** meeting a few days after the delivery of the inception report to discuss the final project design, the data sources to be used, approaches and methodologies to be applied, and the final planning of the project;
3. A two-days meeting to present and discuss the draft **interim report**, and prepare further work for WPs 2 and 3;
4. A one-day meeting to present the **draft final report** and discuss possible improvement and key methodological findings and policy messages to be included in, and agree on the final version.

All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described in section 2.3, have to be included in the Financial offer (see Table in point 5.3, items 2a and 2b respectively).

For quality assurance purposes Cedefop may decide to hold an **international validation workshop** (to discuss and validate the main results from the research to be included in the final report) and an **international conference** for the presentation of the final research outcomes. The Contractor may be asked to contribute to those events, which will be reimbursed by Cedefop according to its relevant rules (see Annex IV of the Draft Contract in Annex B).

Any extra travel expenses, 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 IV of the Draft Contract in Annex B).

3 SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1 Exclusion criteria

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

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

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

3.2 Selection criteria

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

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

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

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

3.2.1 Economic and Financial capacity

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

Requirement:

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

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

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

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

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

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

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

3.2.2 Technical and professional capacity

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

Requirements

- The tenderer must have performed contracts within the last three (3) years in the field of research and comparative analysis on continuing vocational education and training policies at European level, with a total minimum turnover (invoiced financial value) of 110,000 Euro.
- The Tenderer's 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 graduate in social science with at least:
 - 8 years of experience in research and comparative analysis on education and training policies at international level;
 - 5 years of experience in International research project management;
- **Senior expert 1** (at least 1 member) - University graduate in social science with at least 5 years of experience in research and comparative analysis on continuing vocational education and training policies at international level, of which at least three years of experience must be in WBL-CVET policies and practices;
- **Senior expert 2** (at least 1 member) - University graduate in social science with at least 5 years of experience in designing, organising and conducting interviews and questionnaire surveys at international level;
- **Junior Expert(s)** - University graduate in social science with at least 3 years of experience in research on labour market and/or education and training policies;
- **The team leader and the senior experts must have linguistic ability to communicate and draft to a high standard in English. (C1 or equivalent)**

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

- Brief presentation of the Tenderer, demonstrating the required experience in research and comparative analysis on education and training policies with particular reference to WBL-CVET;
- List of contracts performed in the past three (3) years similar to the scope and nature as those required in this call for tenders, describing the contracting authorities, the subjects, the dates, the amounts and the percentage performed by the tenderer (Annex G);
- The Europass curriculum vitae format (<http://europass.cedefop.europa.eu>) or similar format shall be filled in and signed, by each person involved in the execution of the tasks foreseen in the tender, in particular of the persons which constitute the above-noted proposed team of experts; CVs must clearly specify the role of the expert in the team (Team Leader, Senior Experts 1 and 2 and Junior Experts); CVs should mention any experience in WBL-CVET, and also include in a separate annex a list of publications relevant to the abovementioned criteria, and clearly present the linguistic abilities of the team leader and senior experts in English.

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 5.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 5.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form. Tenderers are also requested to complete the respective form (Questionnaire 1) in Annex G.

The Legal Entity Form must be completed and signed by the representative(s) of the tenderer (who sign(s) the cover letter as per point 4 of the Invitation to tender) authorised to sign contracts with third parties.

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

4 ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 34 countries, namely: the 27 EU member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (Croatia, FYROM, Albania and Montenegro).

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

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

4.1 Joint Offers/ Groupings (Consortia)

Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.

Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.

If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.

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

Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).

Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.

The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium).

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

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

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

4.2 Subcontracting/Subcontractors

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

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

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

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value and total subcontracting does not exceed 40%), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

5 AWARD OF THE CONTRACT

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

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

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

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

Whereby:

TQV = Total Quality Value of the tender, obtained as per point 5.1;

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

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

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

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each of the award (evaluation) criteria 1 and 2 and a minimum of 65 out of 100 points (TQV) in the technical evaluation – see below).

5.1 Technical proposal

Tenderers are requested to organise the technical offer in headings or to structure it in such a way as to ensure that the content of the technical offer 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.

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 services proposed for performance of the contract.

It is up to the tenderer to prepare in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full to) all

requirements outlined in the Terms of Reference⁴. The proponents are, however, expected to develop the proposal on the basis of the following scheme:

FRAMEWORK TEMPLATE FOR THE TECHNICAL PROPOSAL	
1. Summary of proposal	
a. overall synthesis (in bullets)	
b. highlighting of the key/qualifying aspects of the proposal	
c. additional services offered (compared to the ToR)	
2. Rationale of the project	
a. description of scope, outcomes, outputs, innovativeness	
b. general description of the methodology, tools and approaches	
c. comments on the ToR and key issues to the achievements of expected results	
d. assumptions and risks inherent to the study	
3. Methods and tools	
a. Overall approach	
b. Activities description	
i. WP1 - The landscape of work-based learning in CVET	
ii. WP2 - Needs, challenges and priorities for work-based learning	
iii. WP3 – Analysis and validation of results and policy recommendations	
c. Synoptic table (list of activities by WPs specifying: inputs, outputs and outcomes)	
4. Project management, work organization and team of experts	
5. Quality assurance and risk management	
6. Timetable and project's workflow	

The maximum length of the Technical Proposal to be submitted is **50 pages** (all included except table of contents as well as start and end pages). The font should be 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 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.

⁴ All the information and means of proof provided commit the tenderer (and respectively the contractor) throughout the duration of the contract.

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 – see references in italics to the framework template in point 5.1.

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	70
1.1. Rationale of the project (understanding of the scope , expected outcomes , and requirements and expected outputs for the specific tasks of the project; innovative character of the approach; overall congruence and reliability of the methodologies; completeness of the services offered). <i>Point 2 of the framework template as described in 5.1.</i>	15
1.2. Method and tools <ul style="list-style-type: none"> Relevance of the strategy and techniques for the statistical analysis of national context, for the review of national policies, for the stakeholders and institutional analyses, and for the presentation of the findings; number of countries covered and justification for their choice (WP1) Relevance of the strategy for the design, implementation and data analysis of the two surveys on employers/HR managers and training providers; sectors covered and justification for their choice (WP2) Relevance of the strategy and techniques proposed for the analysis of results and the validation of the policy and practice recommendations (WP 3) <i>Point 3 of the framework template as described in 5.1.</i>	20 20 15
2) WORK ORGANISATION AND PROJECT MANAGEMENT	30
2.1. Project management, work organization and team work (function and role of the team leader, management structure and project management, allocation of tasks among experts to ensure experience mix and coverage of complementary subjects based on the expertise and potential of the research team, communication with Cedefop and reporting lines) <i>Point 4 of the framework template as described in 5.1.</i>	10
2.2. Quality assurance and risk management (tools and processes to be used, back-up/replacement arrangements, adequate consideration of possible hindrances) <i>Point 5 of the framework template as described in 5.1.</i>	10
2.3. Organization of the work process (timetable and workflow outlining the intended organisation and milestones, and demonstrating the feasibility of the proposal) <i>Point 6 of the framework template as described in 5.1.</i>	10
OVERALL TOTAL SCORE (Total Quality Value)	100

5.3 Financial proposal

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

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities indicated in the Terms of Reference, taking also into account the indication in point 1.5 above. The tenderers must fill in the following Price schedule table and present a detailed breakdown of the price offered.

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

Price schedule table

1)	Names / positions of the Experts /Service <i>(if applicable)</i>	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 meetings at Thessaloniki - see point 2.5, 1 st paragraph	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 nd paragraph	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 = 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.

5.4 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each of the award criteria 1 and 2 will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered in the Price schedule table (see point 5.3).

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

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

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.

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 version and three copies of:

- the Financial Proposal containing all information requested in point 5.3.

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 *.word)

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_fr.cfm

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

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PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

(Given as separate file in *.word)

ANNEX G

QUESTIONNAIRES 1- 4

(Given as separate file in *.word)

ANNEX H

CEDEFOP'S STYLE MANUAL

(Given as separate file in *.pdf)

ANNEX I

MODEL 1 - POWER OF ATTORNEY

MODEL 2 - POWER OF ATTORNEY

(Given as separate file in *.word)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate file in *.word)