

FINANCE AND PROCUREMENT

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Thessaloniki, 27 July 2018

OPEN INVITATION TO TENDER

Long-term cross-country mobility in apprenticeships **AO/DLE/RCDRCR_LRUST/Mobility_in_Apprenticeships/007/18**

REFERENCE: Contract notice: 2018/S 143-325953 of 27/07/2018

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

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

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

or

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

or

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

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

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

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

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

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

Tenderers must pay attention to the **quality of the packaging material**, especially of the inner envelope, in order to make sure that it will remain sealed until the formal opening of tenders by the Agency.

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>OPEN INVITATION TO TENDER</p> <p>CEDEFOP No: AO/DLE/RCD CR_LRUST/Mobility_in_Apprenticeships/007/18</p> <p><i>‘Long-term cross-country mobility in apprenticeships’</i></p> <p>Name of tenderer:</p> <p>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 section 6 of the attached Tender Specifications.

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

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
5. **Submission of a tender implies acceptance of all the terms and conditions set out in this Invitation to Tender, in the specifications and in the draft contract and**, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract. Therefore, It is mandatory to include in the offer a **Cover Letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
6. The opening of tenders will take place at Cedefop on the date and time specified in the timetable in point 8 below. Each tenderer may be represented at the opening of tenders by maximum two representatives. The names of the persons attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least three working days prior to the opening session. Failing that, Cedefop reserves the right to refuse access to its premises.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

7.1 Contacts before the final date for submission of tenders:

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

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

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

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

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

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/en/about-cedefop/public-procurement>.) **Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

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

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

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	19/09/2018	N/A
Last date on which clarifications are issued by Cedefop	21/09/2018	N/A
Deadline for submission of tenders (hand delivered)	27/09/2018	17h00
Deadline for submission of tenders by post / courier	27/09/2018	N/A
Validity of the tenders	26/03/2019	N/A
Tender opening session	11/10/2018	11h00
Estimated contract signature date	December 2018	

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

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

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

10. All costs incurred for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.

11. Up to the point of signature, the contracting authority (i.e. Cedefop) may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.

12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon:

- the signature of 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:

https://www.cedefop.europa.eu/files/public_procurement_-_privacy_statement_2018-05-18.pdf

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

14. Your personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE).
15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.
16. You will be informed of the outcome of this procurement procedure by e-mail only. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Yours sincerely,

signed Michail Christidis
Head of Finance and Procurement

Attached: Tender Specifications

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

OPEN INVITATION TO TENDER

AO/DLE/RCDCR_LRUST/Mobility_in_Apprenticeships/007/18

Long-term cross-country mobility in apprenticeships

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>

About Cedefop

Cedefop is the European Union's agency for vocational education and training (VET). With its research and analyses, it supports the European Commission, EU Member States and social partners in designing and implementing VET policies, with a focus on how best to link education and employment.

European labour markets have been unsettled by globalisation, technological advances and demographic changes (ageing of the population and immigration). The economic downturn of the last decade has increased social inequality and geographical disparity. To address the economic, social, technological and environmental challenges, structural reforms both of labour markets and education and training systems are needed.

In this context, vocational education and training can help get people (back) into work and promote equality, inclusion and solidarity. VET is a pillar of lifelong learning, providing young people with an initial qualification and adults with upskilling options. VET caters both for the brightest, offering them interesting career prospects, and the most vulnerable, opening different pathways into the labour market.

Cedefop's work can be divided into three main strands:

Shaping VET

VET systems and institutions must be relevant to individual and labour market needs. Cedefop fosters their renewal and modernisation in response to emerging policy needs and priorities. It monitors labour market changes and policy implementation in the EU Member States and reports on these.

VET systems need to take into account learning acquired in different ways and at different times and allow people to move between countries and sectors. Cedefop promotes the use of European tools such as qualifications frameworks which allow Europeans working or learning abroad to "take their qualifications with them" by facilitating understanding and recognition of these.

Valuing VET

The ultimate goal of VET policy is to meet the needs of individuals: to strengthen their employability, help them find and keep jobs and allow them to make a good living. At individual countries' request, Cedefop reviews their VET policies and programmes to support effective implementation of European policies (e.g. work-based learning and apprenticeships) and policy learning between countries.

With its work on guidance and the validation of non-formal and informal learning, Cedefop promotes access to VET. It supports the inclusive role of VET by facilitating the (re)integration into education and training of low-skilled and other vulnerable groups.

Informing VET

Cedefop looks into how socio-economic and demographic trends affect employment, nature of jobs and demand for skills in the labour market. It forecasts future skills needs and supply to help individuals, employers and policy makers to make informed decisions about education, training and careers. It identifies policies and practices to help policy makers and VET providers address skills mismatches.

Cedefop supports countries to develop their own intelligence and data on skills and employment needs.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. 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 a Financial Proposal containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

(a) Title of the contract: **Long-term cross-country mobility in apprenticeships**

(b) Short description of content of the contract:

This service contract falls under Cedefop's activity on work-based learning: apprenticeships. The contractor will assist Cedefop to:

1. Design an analytical framework (*framework level*) outlining the dimensions for the analysis and design of the policy, and formulating assumptions (it will underpin points 2 and 3 summarised below); estimate the potential demand for the policy.
2. Field work to collect information with a view to test the dimensions and the assumptions formulated in the analytical framework (point 1 above), by carrying out:
 - 2.1. six country case studies (*system level*),
 - 2.2. three project case studies (*implementation level*),
 - 2.3. a comparative analysis of the results of the country case studies (2.1) and of the project case studies (2.2) and collection of European social partners' views and opinions.
3. Draft a guiding paper to design long-term cross-country mobility projects for apprentices and also enable reform apprenticeship schemes or systems and make them "readier" for it.

(c) Type of contract: Direct Service Contract

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 terms of reference. 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 **300,000 €** (VAT excl.).

In the case where unforeseen circumstances result in the global value of this contract being consumed faster than originally planned, Cedefop reserves the right to consider conducting a 'Negotiated procedure without prior publication of a contract notice' with the existing contractor(s) in order to increase the maximum amount stated above by up to 50% (Art. 134(e) of the Rules of Application (RAP) implementing the EU Financial Regulation (FR)).

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 22 months.

1.7. Main terms of financing and payment

Payments will be made as follows:

- First 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.
- Interim payment: 30% after submission of 2nd 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

Mobility² is recognized as an increasingly relevant dimension of learning experiences at different levels and of different nature, including VET, with benefits for learners and companies³. While research and policy have focused on transnational mobility mostly for general education students (particularly at higher level with the Erasmus programme), mobility in VET has been less studied, and mostly in terms of pupils' social mobility or across sectors and occupations. Likewise, international mobility (especially long term) is present but relatively low in general education at upper secondary level, while, even considering the phenomenon of "hidden mobility"⁴, it is marginal in VET⁵ and almost pioneering in apprenticeships.

Nevertheless, based on the assumption that "learning mobility can strengthen the future employability of young people", in the last 20 years a rich policy framework for mobility in IVET, along with policy and tools to support it (Leonardo, Erasmus+, EuroApprenticeship⁶ etc.), have been developed (box 1).

Box 1 - EU Legislation and Policy initiatives in the field of mobility in IVET (selection)

2017	Commission Progress Report on a Learning Mobility Benchmark COM (2017)148 final Cedefop mobility scoreboard
2016	Commission Staff Working Document Analytical underpinning for a New Skills Agenda for Europe SWD (2016) 195 final
2015	EU Youth report
2011	Council recommendation Youth on the move promoting learning mobility of young people
2010	Youth on the move package Council conclusions on European researchers' mobility and careers
2009	Green Paper Promoting the learning mobility of young people Results of the consultation Impact Assessment
2008	Council recommendation on the mobility of young volunteers across the EU Council conclusions on youth mobility
2006	European quality charter for mobility
2001	Recommendation of the Parliament and of the Council on mobility for students, persons undergoing training, volunteers, teachers and trainers
2000	Council Resolution concerning an action plan for mobility

² *Mobility*: stays abroad organised explicitly for purposes of learning (intentionality), including work-placements abroad and also apprenticeships.

³ COM(2016) 940 final of 7.12.2016

⁴ Nationale Agentur Bildung für Europa beim Bundesinstitut für Berufsbildung (2011), *Verdeckte Mobilität in der beruflichen Bildung*, Bonn
http://www.bildungsserver.de/onlineressource.html?onlineressourcen_id=47560

⁵ Søren Kristensen et al. (2006), Support for Mobility, p. 45 <https://www.eurashe.eu/library/modernising-phe/mobility/policy/WG4%20R%20support%20for%20mobility%20report.pdf>

⁶ Euro Apprenticeship is a network of competent bodies, intermediate organisations and Vocational Education and Training (VET) centers providing expertise, information, help and support for the implementation of 'In-company Learning Mobility' for the benefit of SMEs, Skilled Crafts Companies and apprentices or learners in alternative training systems <http://www.euroapprenticeship.eu>

Less attention has been given to the topic of “mobility in apprenticeship”⁷. The peculiar institutional features and organizational characteristics of apprenticeships may obstruct the introduction of international (especially long-term) mobility periods for apprentices, depending also on countries’ degree of readiness to embrace such challenge. When it comes to apprenticeships, there are specific obstacles that can further hamper transnational mobility, including the following:

- First, heterogeneity of “apprenticeships”: as the results of Cedefop’s study on a Cross-national overview on apprenticeships show, heterogeneity of apprenticeships is high both between countries (different functions, different approaches to the organisation of learning – varying from very structured learning to no or limited structure), and within countries (same apprenticeship scheme is made up of sub-schemes, subject to high degree of adaptation to the extent that single learners’ experiences may differ significantly).
- Apprentices’ mobility experiences may concern only the school-based part or the company-based part or both. This also makes it very different to consider “apprentices’ mobility” as a homogeneous phenomenon and to gather data about it.
- Employers’ engagement and trust in apprenticeships as quality learning opportunities vary from country to country, also as a consequence of the different apprenticeships existing across the EU. Against this background, employers often consider mobility programs for apprentices and non-graduates costly, although they acknowledge mobility benefits for their employees, other than apprentices⁸.
- Extensive approaches to consider apprenticeships as paid employment or employment contract may hamper positive attitudes towards cross-country learning mobility benefitting the young person. The nature of employment contracts might pose additional bureaucratic obstacles to manage the absence of the apprentice from the company when abroad. Similar obstacles refer to the employee insurance and the respect of occupational health and safety standards.
- With the exception of the apprenticeship schemes implemented via apprenticeship programmes, the duration and structure of the apprenticeship training highly varies on a case by case basis with apprenticeship training that may last 6 months and placement in the company that may be as long as 50% of the 6 months. In addition, the organisation of alternance between learning venues on a weekly-basis (e.g. 2 days/week at school and 3 days/week in the company) may not be a supportive condition of apprentices’ geographical mobility.

On the other end, the case for expanding mobility opportunity lies in its potential benefits⁹, both for learners and companies/sectors:

For the learners:

- Competence development, professionalism, technical competences, including internationalisation, team work and language skills
- Knowledge of other work, production and organisational cultures and processes
- Knowledge about other cultures and people, openness and European spirit
- Increased self-confidence and social skills

⁷ *Apprenticeships*: a systematic, long-term training alternating periods in a school or training centre and at the workplace; the apprentice is contractually linked to the employer and receives remuneration (wages or allowance). The employer assumes responsibility for providing the trainee with training leading to a specific occupation.

⁸ Despite limited qualitative research on this topic, it seems that students’ mobility (in general, not necessarily referring to IVET or apprentices) result in potentially more advantageous for high performers with potential for senior posts and more generally for graduates and professional staff as compared to staff with lower education level and operational tasks.

⁹ Baromètre EuroApprentissage.

- Motivation to work abroad in later career stages
- Higher competitiveness on the labour market.

For the companies/sectors:

- Participants' higher commitment
- Improved work performance, better team work, more autonomous apprentices, prepared and more flexible workforce
- Broader perspective – with positive impacts on innovation and change
- Positive impacts on the internationalisation side of the enterprise
- Greater sector mobility
- Improved image and attractiveness.

Moreover, apprenticeship's international dimension is becoming more and more relevant, especially in highly internationalised sectors of the labour market, for example in the case of VET qualifications defined at an international sectoral level. In this connection,

There is a need for in-depth reflection on the possibility to introduce cross-country mobility in apprenticeships, by identifying the necessary framework conditions that would make it possible and sustainable for employers, learners, VET providers.

2.2. Description of the tender

2.2.1 Overall objective

This study aims at the identification and formulation of the necessary conditions (i.e. framework, system and implementation levels) and actions favouring long-term cross-country mobility of apprentices – in the form of a guiding paper that could be used a) to reform apprenticeship schemes or systems (make them readier for mobility) and b) to design mobility projects for apprentices.

2.2.2 Subject and scope of the work

For the purposes of this call, apprenticeships or apprentice is understood as per the official definition used by the relevant national authorities; “long-term cross-country mobility of apprentices” is used to indicate periods abroad of at least six months organised explicitly for purposes of learning (intentionality) in the context of an apprenticeship.

The work on this project will be organised in three parts, detailed in 2.3: The conceptual work (*framework level*) in part 1, the comparative analysis of field research and the collection of the views and opinions of the EU social partners on long-term cross-country mobility of apprentices in part 2 and the analysis and synthesis in part 3 should have an EU wide scope.

In part 2, the field work (research) will be conducted in at least six countries (*system level*): Austria, Denmark, France, Hungary, Ireland, and the Netherlands, with a special focus on France. The study will also focus on three conducted/ongoing projects for long-term cross-country mobility of apprentices, two of which involving France (*implementation level*).

2.3. Requested services and tasks

The services requested under this contract aim at:

1. Providing an analytical framework for long-term cross-country apprenticeship mobility, outlining the dimensions to be explored at the framework, system and implementation levels and formulating assumptions for each dimension. The framework will underpin parts 2 and 3. Estimating the potential demand for the policy;

2. Conducting field-work to deliver country case studies and project case studies, comparative analysis of findings and collecting the views and opinions of social partners at the EU level.
 - A. Country case studies in six selected countries to investigate the level/structural enablers and disablers for long-term cross-country mobility (along the dimensions identified in the analytical framework).
 - B. Project case studies on three concluded/ongoing long-term cross-country apprenticeship mobility projects to learn lesson about the implementation of the policy from previous experiences (along the dimensions identified in the analytical framework), two of which involving France.
 - C. Comparative analysis of findings, along the dimensions of the analytical framework and collection of the views and opinions of the EU social partners on long-term cross-country mobility of apprentices to understand what works, what does not work and what needs to be done along the dimensions identified in the analytical framework.
3. Delivering a guiding paper encompassing all dimensions to be used to design long-term cross-country mobility projects for apprentices and also enable reform apprenticeship schemes or systems and make them “readier” to undertake this policy.

Briefly, the three parts of the project consist of:

Part	Main objectives	Main activities
1 (conceptual work)	Analytical framework and potential demand	Literature review on long-term cross-country mobility in apprenticeship. Development of an analytical framework outlining the dimensions to be explored at the framework, system and implementation levels and formulating assumptions. Estimating the potential demand for the policy.
2 (field work)	A) country case studies	Conducting six country case studies in AT, DK, FR, HU, IE, NL with a special focus on France.
	B) project case studies	Conducting three project case studies on concluded/ongoing long-term cross-country apprenticeship mobility projects, of which at least two involve France.
	C) Comparative analysis of findings and EU social partners' views and opinions	Carrying out a comparative analysis of findings, along the dimensions of the analytical framework. Collecting the views and opinions of social partners at the EU level, for example in the form of a focus group.
3 (analysis and synthesis work)	Guiding paper	A guiding paper, encompassing the framework, system and implementation level conditions and actions to design long-term cross-country mobility projects for apprentices and also enable reform apprenticeship schemes or systems and make them “readier” for long-term cross-country mobility.

2.3.1. Part 1: Conceptual work – analytical framework and potential demand

The overall objective of this phase is developing an analytical framework for long-term cross-country apprenticeship mobility, outlining the dimensions to be explored at the framework, system and implementation levels and formulating assumptions (it will underpin parts 2 and 3). To this end, the contractor will be asked to carry out a background note and literature review on the topic. In this phase the contractor will be asked also to estimate the potential demand for the policy.

Part 1 should be concluded before starting Part 2.

The expected duration of this phase is 6 months.

Set of deliverables part 1

1. Inception report, including
 - 1.1. Background note on the topic
 - 1.2. Preliminary structure of the analytical framework
 - 1.3. Approach to estimate the potential demand for the policy
 - 1.4. Preparation of field work for Part 2A (country background, mapping of stakeholders, questions to be addressed), for Part 2B (project identification, mapping of stakeholders, questions to be addressed) and for Part 2C (mapping of relevant social partners at the EU level, questions to be addressed)
2. Analytical framework
3. First interim report containing the revised methodology and tools for Parts 2A and 2B (including the final selection of projects) and 2C, and estimate of the potential demand for policy.

2.3.2. Part 2: Field work – country case studies, project case studies, comparative analysis of findings and EU social partners' views and opinions

Conducting field work to deliver country case studies and project case studies, carrying out the comparative analysis of the findings and collecting the views and opinions of social partners at EU level.

The objective is to have:

- country case studies and project case studies
- comparative analysis and EU social partners' views and opinions

in order to:

- a) Compile, test and revise the framework
- b) Identify enablers and disablers at all levels
- c) Identify good practices at the implementation level
- d) Understand what works, what does not work and what needs to be done at all levels, and the perspective of the EU social partners.

To do so the contractor will analyse the apprenticeship schemes or systems against the dimensions of the framework at their system level through six country case studies (2A), and at the implementation level through three project case studies (2B), carry out a comparative analysis of findings and collect the views and opinions of EU social partners (2C).

Parts 2A and 2B may run in parallel. Part 2C shall start after completion of 2A and 2B.

The expected overall duration is 11 months.

2.3.2.1. Part 2A

The contractor will design and carry out country case studies in six selected countries i.e. AT, DK, FR, HU, IE, NL, with a special focus on France, to investigate the level/structural enablers and disablers for long-term cross-country mobility of apprentices (along the dimensions identified in the analytical framework). This part will look at the system level that is mainly how apprenticeship is designed in the legal framework and the allocation of roles and responsibilities in the governance mechanisms.

The contractor will be asked to conduct desk research and minimum 100 interviews: around 10/15 in each country, except for France where the number of interviews should be double. Interviews should survey at least:

- 2 representatives of ministries of education and labour
- 2 social partners (employers and unions) at national level
- 2 experts national level
- 2 government representative local level
- 2 social partners (employers and unions) at local level
- 2 VET providers local level.

The expected duration is 7 months.

Set of deliverables part 2A.

4. Six interim notes with analysis of findings of both desk research and field research in the six countries (set of deliverables 4).
5. Six country case study reports, including background note about the country and analysis of findings of both desk research and field research (set of deliverables 5).

2.3.2.2. Part 2B

The contractor will design and carry out project-case studies on three concluded/ongoing long-term cross-country apprenticeship mobility projects to learn lesson about the implementation of the policy from previous experiences and identify good practices.

The contractor will be asked to conduct desk research and minimum 30 interviews, about 10 per project case study. Two of the three projects selected should involve France. Interviews should survey at least:

- 2 VET providers (1 from hosting and 1 from sending country)
- 2 trainers (1 from hosting and 1 from sending country)
- 2 company tutors (1 from hosting and 1 from sending country)
- 2 social partners reps (1 from hosting and 1 from sending country)
- 2 apprentices.

The expected duration is 6 months.

Set of deliverables part 2B.

6. Three interim notes with analysis of findings of both desk research and field research (set of deliverables 6).
7. Three project-case studies reports including analysis of findings of both desk research and field research (set of deliverables 7).

2.3.2.3. Part 2C

Building on the analysis of the results of parts 2A and 2B, this part aims to understand what works, what does not work and what needs to be done at all three levels (framework, system, implementation). The contractor will carry out a comparative analysis of findings of parts 2A, 2B, along the dimensions of the analytical framework. A discussion with the EU social partners will help collecting their views and opinions, for example, in the form of a focus group, also with reference to their political will of supporting policies for long-term cross-country mobility for apprentices.

The expected duration is 4 months.

Set of deliverables part 2C

8. Second interim report, including: a comparative analysis of findings of Parts 2A and 2B, and the summary of findings of Part 2C; a draft template for the guiding paper (set of deliverables 8).

2.3.3. Part 3: Analysis and synthesis work – guiding paper

Draft a guiding paper encompassing all three levels to be used to design long term mobility projects for apprentices and also enable reform apprenticeship schemes or systems and make them “readier” for long term cross-national mobility of apprentices.

The guiding paper would also include:

- Examples of good practices
- Views and opinions of the stakeholders, in particular, the social partners
- Revised estimate of the potential demand for the policy.

Part 3 should start after completion of parts 1 and 2 and build on their results.

The expected duration is 5 months.

Set of deliverables part 3

9. Guiding paper (deliverable 9)
10. Final report including summary of the project findings (parts 1 and 2), and a revised estimate of demand for the policy (deliverable 10).

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 approx. 4 weeks after the entry into force of the service contract (second month) and it should include:

- Background note on the topic,
- Preliminary structure of the analytical framework,
- Approach to estimate the potential demand for the policy,

- Preparation of field work for Part 2A (country background, mapping of stakeholders, questions to be addressed), for Part 2B (project identification, mapping of stakeholders, questions to be addressed) and for Part 2C (mapping of relevant social partners at the EU level, questions to be addressed),
- 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 4 months after the entry into force of the service contract (fifth month) and it will include:

- The revised methodology and tools for Parts 2A and 2B (including the final selection of projects) and Part 2C (mapping of relevant social partners at European level, questions to be addressed).
- An estimate of the potential demand for policy
- An updated work plan and timing.

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 15 months after the entry into force of the service contract (sixteenth month) and it will include:

- A summary and comparative analysis of findings of Part 2
- Draft template for the guiding paper
- An updated work plan and timing.

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 20 months after the entry into force of the service contract (twenty-first month) and will include:

- A summary of the project findings (parts 1 and 2),
- A revised estimate of demand for the policy.

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 before the end of the 22nd month.

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.

2.4.4. Exploitation of the results of the contract / Anti-plagiarism checks

Tenderers are requested to read carefully the following articles of the draft contract (in Annex B of the procurement documents):

Article I.10 – Exploitation of the Results of the Contract

Article II.13 – Intellectual Property Rights

Article I.14.1 – Other Special Conditions, which complements the provisions of Article II.13 as regards the use of results of the research by the contractor

Article I.14.2 – Anti-plagiarism checks

2.5. Meeting and Travel Expenses

2.5.1. Meetings foreseen

At least two members responsible for the co-ordination of the study on behalf of the contractor (team leader and one senior international expert) 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 analytical framework, and in general to fine-tune the final planning of the activities and relative timing;
- (b) an **interim meeting** after the delivery of the second interim report to discuss the comparative analysis of findings of Part 2 and the opinions of the EU level social partners, and to agree on a template for the guiding paper;
- (c) a **final meeting** to take place after the first draft of the final report, to discuss this and the draft guiding paper.

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. Extra travel expenses

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

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

3.1. Exclusion Criteria

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

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

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** financial years concerning socio-economic research and/or policy analysis should be at least **325,000 €**.

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

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last **three** financial years concerning socio-economic research and/or policy analysis.

In 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, **but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.**

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

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

3.2.2. *Technical and professional capacity*

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

Requirements for technical and professional capacity:

- The tenderer must have adequate experience in the field of EU/international and comparative research and/or policy analysis on vocational education and training and/or apprenticeships and/or mobility of learners, having performed contracts similar to the scope and nature as those required in this call for tenders with a total minimum contract value of **490,000€** (invoiced financial value) during the last three (3) years.
- The Tenderer's experts, whose involvement will be instrumental for the successful implementation of the contract, must have profiles, knowledge and experience relevant to the subject of the contract.
- 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 with at least:
 - 5 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 coordinator (1 member) – University degree at bachelor or master or PhD level in social sciences with at least 6 years of experience in scientific research on vocational education and training and/or apprenticeships, at EU/international level;
- Senior international experts A (2 members):
 - University degree at bachelor or master or PhD level in social sciences with at least 5 years of experience at EU/international level in research projects and/or policy analysis on VET, and at least 2 years of experience at EU/international level in research projects and/or policy analysis on apprenticeships;
- Senior international experts B (2 members):
 - University degree at bachelor or master or PhD level in social sciences with at least 5 years of experience at EU/international level in research projects and/or policy analysis on education and at least 2 years of experience at EU/international level in research projects and/or policy analysis on mobility of learners.
- Junior international experts (3 members):
 - University degree at bachelor or master or PhD level 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.

For each country involved in part 2A (Austria, Denmark, France, Hungary, Ireland, and The Netherlands), 1 senior and 1 junior national expert:

- Senior national experts (6 members):
 - University degree at bachelor or master or PhD level in social sciences with at least 5 years of experience at EU/international level in research projects and/or policy analysis on vocational education and training and/or apprenticeships in the relevant country.
- Junior national experts (6 members):
 - University degree at bachelor or master or PhD level 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 in the relevant country.

All experts should be able to speak and write in English at Level C1 of the Common European Framework of Reference for Languages. In addition, the mother tongue of all senior and junior national experts should be the official language of the country they are assigned to. Alternatively, the national experts should be able to speak and write in the national languages of the countries they are assigned to, at level C2 of the Common European Framework of Reference for Languages. 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 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 and/or policy analysis on vocational education and training and/or apprenticeships and/or mobility of learners (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 and/or policy analysis on vocational education and training and/or apprenticeships and/or mobility of learners. 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) 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 Coordinator, Senior International Expert, Junior International Expert, Senior National Expert, Junior National Expert) and his/her expertise relevant for the purposes of the proposed contract.
- (d) For each CV **Questionnaire 5 of Annex G** must also be filled-in, synthesising information aimed at demonstrating the professional capacity of the team member as above requested. In particular in Questionnaire 5 of Annex G clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, main activities and responsibilities), and clearly present the linguistic abilities. In addition the CV of the scientific coordinator should also include a list of his/her publications relevant to the subject of the call.

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC which can be found in the following link: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.

Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 36 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 5 SAA Countries (FYROM, Albania, Serbia, Montenegro and Bosnia & Herzegovina).

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

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

4.1. Joint Offers/ Groupings (Consortia)

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

- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

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

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

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers.

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

5. AWARD OF THE CONTRACT

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

The contract shall be awarded to the tenderer submitting the best price-quality ratio method as represented by the highest Total Score (TS) out of 100.

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

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

Whereby:

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

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

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

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

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

5.1. Technical evaluation

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

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

Award criteria	Maximum number of points
A) Understanding and methodology (methodology should be clear, coherent, sound and demonstrate feasibility and tenderers' understanding of the topic and of the project objective)	65
1. Reflection on the relevance of the topic of long-term cross-country mobility in apprenticeships at the European level, and the challenges associated to it <i>Point 2.1 of the template in section 5.2</i>	10
2. Reflections on the role, structure and content of the analytical framework and its application throughout the project in view of the guiding paper <i>Point 2.2 of the template in section 5.2</i>	15
3. Estimating the policy potential demand in Europe: aim, method, data sources and access to data <i>Point 2.3 of the template in section 5.2</i>	10
4. Carrying out the field work. - For parts 2A and 2B: understanding of the country- context; project proposal for the case studies; aim and method to carry out the case studies; identification of interviewees and contact. - For part 2C: selection of stakeholders and method to collect the views and opinions of the EU level social partners <i>Point 2.4 of the template in section 5.2</i>	30
B) Organisation and management (arrangements should be clear, balanced, consistent and demonstrate feasibility of the proposal from an organisational/management point of view)	35
1. Project management, work organization and team work <i>Point 3.1 of the template in section 5.2</i>	10
2. Quality assurance and risk management <i>Point 3.2 of the template in section 5.2</i>	10
3. Organization of the work process <i>Point 3.3 of the template in section 5.2</i>	15
Overall total score (Total Quality Value -TQV)	100

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

- do not reach a minimum of 50% of the possible score for each of the award (evaluation) criteria A and B and
- obtain an overall total score (Total Quality value) of less than the total **65** (of a maximum of 100) points against the award (technical) criteria,

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

5.2. Technical proposal

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

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 proponents 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. Key/qualifying aspects of the proposal;
 - 1.3. Any additional services offered (compared to the ToRs).
2. Methodology and tools
 - 2.1. Relevance of the topic of long-term cross-country mobility in apprenticeships at the European level, and the challenges associated to it
 - 2.2. Analytical framework
 - Role, structure and content
 - Application throughout the project in view of the guiding paper
 - 2.3. Estimating the policy potential demand in Europe: aim, method, data sources and access to data
 - 2.4. Carrying out the field work.
 - For parts 2A and 2B: country- context; project proposal for the case studies; aim and method to carry out the case studies; identification of interviewees and contact.
 - For part 2C: selection of stakeholders and method to collect the views and opinions of the EU level social partners
3. Organisation, project management and staff allocation
 - 3.1. Project management, work organization and team work
 - reporting;
 - management structure and function and role of the team leader;
 - distribution of tasks among experts back-up/replacement arrangements
 - communication and collaboration with Cedefop.
 - 3.2. Quality assurance and risk management
 - quality assurance of the processes and outputs
 - internal and external risks and proposals to overcome them
 - 3.3. Organisation of the work process - timetable, project's workflow, and milestones

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

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

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

5.3. Financial evaluation

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

Where Y = price weighting (see the complete formula under point 5 above)= 30

Information concerning price

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

[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 / supplies* offered, and in order to check if the tender can be considered valid, the evaluation committee will, before it may reject this tender, send a request for clarifications to ask for explanations on the components of the tender which it considers relevant to the presumed abnormally low price and shall verify those constituent elements taking account of the explanations received.

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

A price will be considered abnormally low if the financial offer of any tenderer is lower with more than the acceptable margin of deviation from the average price of the other technically acceptable offers (please note that definition of which offers are technically acceptable/ compliant is given in points 5, 5.1 and 5.3 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 **30%**.

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

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

5.3.2. Financially unacceptable tenders

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

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

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

5.4. Financial Proposal / Financial Scenario

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

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

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderers must fill-in the 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. All services that shall be procured should be included.

The cost of professional proof-reading and editing in English of the final report(s) as submitted to Cedefop (see also point 2.4.3) should be included in item 2c) of the Financial Proposal.

Price schedule table

1)	Names / positions of the Experts /Service	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 (3) three 1-day meetings in Thessaloniki (min. 2 experts per meeting) - 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.

Please note that Cedefop estimates for quantities are indicative and do not constitute any kind of legal obligation for the Centre.

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

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

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

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

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

“Declaration on honour on exclusion criteria and selection criteria”

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

and completed and signed by an authorised representative of the tenderer (group leader in case of consortium, with indication of entity, name and function), but not by subcontractors.

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

Please Tick ✓ the boxes provided

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please explain the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	<input type="checkbox"/>	<input type="checkbox"/>	
- 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	<input type="checkbox"/>	<input type="checkbox"/>	
- Declaration on Exclusion & Selection Criteria (including those of consortium members and subcontractors, if applicable)	3, 6.1 & Annex C	<input type="checkbox"/>	<input type="checkbox"/>	
- selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	<input type="checkbox"/>	<input type="checkbox"/>	
- Questionnaires 1 - 6 (Annex G)	3.2, 4.1; 6.1 & Annex G	<input type="checkbox"/>	<input type="checkbox"/>	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (model 1 or 2)	<input type="checkbox"/>	<input type="checkbox"/>	
- Letter of intent of subcontractor (if applicable)	4.2, 6.1 & Annex J	<input type="checkbox"/>	<input type="checkbox"/>	
- Legal Entity Form	3.3, 6.1 & Annex D	<input type="checkbox"/>	<input type="checkbox"/>	
- Financial Identification Form	6.1 & Annex E	<input type="checkbox"/>	<input type="checkbox"/>	
- this Checklist	6.1 & Annex F	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u>				
one original and three copies of:	6.2	<input type="checkbox"/>	<input type="checkbox"/>	
- the technical proposal	2, 5.2, 6.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	<input type="checkbox"/>	<input type="checkbox"/>	
- the Financial Proposal	5.4, 6.3	<input type="checkbox"/>	<input type="checkbox"/>	

The tenderers should also ensure that:

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

ANNEX G

Questionnaires 1 - 6

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

ANNEX H

Cedefop Style Manual

(Given as a separate zip file)

ANNEX I

Models of power of attorney

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

ANNEX J

Model of Letter of Intent for Subcontractor/s

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