



## **Tender specifications for subcontracting external expertise<sup>1</sup>**

### **EMPLOYERS-LED PROJECT ON APPRENTICESHIPS**

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<sup>1</sup> Under reserve of acceptance of the project by the European Commission

## 1. BACKGROUND

### 1.1 Introduction

BUSINESSEUROPE, CEEP and UEAPME have undertaken to conduct a project on the cost effectiveness of apprenticeships systems in 15 target countries<sup>2</sup>. This project is led by BUSINESSEUROPE on behalf of the EU cross-industry employers' organisations CEEP, and UEAPME, and requires EU financial support. The following organisations will also participate: European Roundtable of Industrialists, EUROCOMMERCE, CEEMET, Digital Europe, EUproVET, EFVET.

As the lead applicant, BUSINESSEUROPE has therefore applied for funding, on behalf of the EU cross-industry employers' organisations, to carry out this project as part of the Integrated Projects of the EU social dialogue 2014-2016. A final decision by the European Commission on the allocation of funds is expected in September 2014. Once this is confirmed the project activities would commence in September/October 2014.

In the framework of this call, BUSINESSEUROPE, CEEP and UEAPME express their intention to select a subcontractor.

This call for tender constitutes the subcontracting work needed to carry out the 24-month activity entitled:

***“The cost effectiveness of apprenticeship schemes – making the business case for apprenticeships”***

The tender specifications included in this document detail the background, tasks, price, and selection criteria and procedures regarding the subcontractor.

Possible bidders need to be aware that awarding of the subcontracting work is dependent on a Commission's positive decision to grant financial support to this project. Moreover, changes to the present call for tender may be required, taking into account possible remarks from the European Commission.

### 1.2 Project Description

Countries with high percentages of students enrolled in work-based VET programmes at upper secondary level usually have the lowest youth unemployment rates. This is evident for Denmark (44.7% - 10.5); Germany (42.9% - 8.6); Austria (34.8% - 6.3); and the Netherlands (20.9% - 6.2%). These countries have a well established tradition for dual-learning apprenticeship schemes.

The involvement of companies in apprenticeships schemes is seen both as a way of identifying and meeting skills needs on the labour markets. Engagement in apprenticeship schemes is considered to bring a number of advantages for companies, including lower recruitment costs, increased production, new knowledge and perspectives from apprentices, and enhanced standing and recognition of the company as a good employer, and more broadly among its main stakeholders (i.e. customers, suppliers).

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<sup>2</sup> Spain, Portugal, France, Italy, Ireland, UK, Czech Republic, Poland, Hungary, Estonia, Latvia, Bulgaria, Greece, Slovakia, Finland

The main reason employers in some countries may be reluctant to engage in offering apprenticeships is the high costs derived from training activities, such as adaptation of work stations, possible mistakes by apprentices, administrative paperwork, time of company trainers and employees monitoring apprentices. The high costs involved may be an even stronger obstacle to the engagement of SMEs. A number of cooperative solutions have been taken at national level to mutualise the costs of training between SMEs in a given sector, for example by providing training opportunities in more than one company for the same apprentice.

The broad context for this initiative is provided, in part, by the European Alliance for Apprenticeships. The specific focus of this project proposal lies in the implementation of the European social partners' Framework of Actions (FoA) on youth employment that was published in June 2013. The FoA highlights the valuable role that apprenticeships play. In particular, well-designed apprenticeship systems have proved to be effective in easing young people's transitions into work. In this respect, the European social partners have a central role to play to encourage the sharing and the improvement of national practices on apprenticeships.

This project is coordinated with ETUC as part of the Integrated Projects of the EU social dialogue 2014-2016. A conference jointly organised by the European social partners will be held at the end of the project cycle to discuss and exchange information on the outcomes of their respective projects on apprenticeships.

### 1.3 Objective

The overall objective of this project is to explore the business case for apprenticeships by focusing on the cost effectiveness of apprenticeship systems.

Specifically, the project aims to:

- Assess the cost effectiveness of various apprenticeship systems and ways of improving existing systems from that perspective, including what kind of catalysts in the form of structures, institutions, governance principles and support measures for enterprises are needed in order for enterprises to find it attractive to engage in apprenticeship training;
- Discuss concrete practices embedded in national systems to help national employer federations who want it to find ways to improve their own system, including in the context of national social dialogue;
- Allow a discussion between sectors already using apprenticeships and those not yet convinced about their added value;
- Promote greater understanding of the dynamics of cooperation between enterprises, employers' organisations, commerce and craft chambers and VET providers in different countries for a well-functioning apprenticeship system.

The anticipated outcome of the project is that it will foster social dialogue by helping employers to engage in discussions with their national union counterparts, as well as VET providers and public authorities that will contribute towards addressing the following recommendations from the Framework of Actions on youth employment:

- Strengthen dual learning elements in existing work-based learning models;
- Participate in the governance of apprenticeship systems;
- Identify and address barriers to the development of apprenticeship systems in each country;
- Ensure that apprenticeship agreements between young people and enterprises clearly define the terms of the apprenticeship and learning objectives of the work-based part of the education.

The present proposal specifically seeks, through the help of a subcontracted expert, to develop research on the cost effectiveness of existing apprenticeship systems in the 15 target countries. The intention would be to look at the cost effectiveness based on two or three occupations in **three targets sectors – ICT, commerce, engineering**, as follows:

#### ICT sector

- Computer network professionals, such as system architect
- Computer network and systems technicians, such as an operations technician (data processing); or network operator
- Cyber security specialists

#### Commerce sector

- Storeman, technical salesman for wholesale
- Shop assistant, specialized retailer, shop manager for retail

#### Engineering sector

- Car mechatronic / mechatronics technician
- IT systems electronics technician

The subcontractor would be responsible for compiling information on the skills and competences that each of these occupations involves and the salary/compensation bracket. Based on this, the subcontractor would be asked to conduct research in the countries concerned and prepare national country reports for the target countries. A report with the main findings would also be presented at a final conference.

## 1.4 Method

### 1. First phase: background research and preparation of country reports

The first stage of the project would involve research into the existing state of play of the apprenticeship system in the target countries, including reforms that are in the process of being implemented, and the cost-effectiveness of the schemes, based on comparative analysis of the above-mentioned occupations. A fund will be available to allow the subcontracted expert to meet with relevant employer's organisations and VET providers in the target countries to gather this information.

The subcontracted expert, in close coordination with the steering committee, will then prepare national country reports for the fifteen target countries. These reports will be used as a basis for discussions at a series of cluster seminars and for future actions at the national level.

## 2. Second phase: cluster seminars

The second stage will involve a series of five cluster seminars that would be organised with the target countries. These seminars would group together 3 countries at a time and would draw on the experiences of those countries that already have well-established dual learning apprenticeship systems – Austria, Denmark, Germany, Switzerland (referred to as resource countries). The seminars would focus on existing examples of (good) practices in the target countries. In particular, the intention would be to do a company visit in each host country to see a practical example of how an apprenticeship scheme is structured and delivered. The general format of the seminars would be developed by the steering committee and then tailored in consultation with the countries concerned.

The cluster seminars will enable the target countries to discuss the country reports and to exchange views and practices among themselves and with the resource countries. Based on these discussions, each target country would develop conclusions from the seminar and prepare an action plan for taking these forward, taking into account the points raised in the individual country report. The subcontractor, and/or a member of his/her team, will attend the cluster seminars and have the possibility to go one day in advance of the seminars for meetings with relevant stakeholders in preparation for cluster seminars discussions on the draft country reports. Therefore, up to two experts may attend the seminars. This is to be determined in consultation with the project organisers.

## 3. Third phase: final conference and final report

Based on the outcome of the seminars, the subcontractor, in close collaboration with the steering committee, will prepare a final report that will be presented at a final conference in Brussels (provisionally foreseen for March 2016). This conference will bring together the project partners and their relevant national affiliates and stakeholders.

A conference jointly organised by the European social partners will be held at the end of the project cycle (provisionally foreseen for May 2016) to discuss and exchange information on the outcomes of their respective projects on apprenticeships.

Building on these projects, the objective will be to foster social dialogue around apprenticeship schemes. So doing, it will contribute to an effective follow-up of the FoA on youth employment.

## 1.5 Activities

A short description of the main features of the project follows:

### **Steering committee meeting #1**

- The steering committee would be composed of representatives from BUSINESSSEUROPE, CEEP, UEAPME and the other associate organisations.
- The first meeting would be in September/October 2014. This meeting will agree the details for the preparatory phase of the project and determine the dates of the clusters seminars and the final conference.

- For each meeting of the steering committee the subcontractor will prepare a summary of conclusions in coordination with the project leader (BUSINESSEUROPE).

### **Research and preparation of country reports**

- Conduct interviews and desk research on the apprenticeship systems in the selected countries and the implementation of apprenticeships in the selected sectors and occupations, including ongoing and past projects carried out by the project partners' affiliates (if any);
- Collect examples of best practices and identify the situation of policy frameworks in the different target countries;

### **Steering committee meeting #2**

- A second meeting of the steering committee will take place in December 2014 to prepare the cluster seminars on the basis of the individual country reports.

### **Five cluster seminars**

- Five two-day seminars
- Seminars would have up to 40 participants. They would be composed of up to 14 representatives from BUSINESSEUROPE (including a maximum of 3 people per member federation per target country, 3 people from member federations in the resource countries, combined, and 3 from the European secretariat). UEAPME would have up to 8 representatives and CEEP 8, which would again be composed of a mixture of European, national and secretariat representatives. In addition, the other stakeholders would be represented by up to 2 representatives (maximum of 10).
- Date: February 2015 – December 2015
- The subcontractor and/or a member of his/her team will also attend the cluster seminars

### **Steering committee meeting #3**

- A steering committee meeting will take place during the period in which the cluster seminars are taking place, for example before summer 2015. The purpose of this meeting will primarily be to take into account any issues arising from the first set of seminars and country reports before the remaining seminars take place.

### **Steering committee meeting #4**

- A committee meeting will take place in December 2015 to discuss the draft final report and to prepare the final conference - foreseen for March 2016.

### **Final one-day employers' conference in Brussels**

- +/- 70 participants from target and resource countries from the project partners (social partners, companies and VET providers), composed as follows:

- 50 participants (national members)
- 10 EU secretariats
- Subcontracted expert (up to 3)
- Up to 7 guest speakers
- Date: March 2016
- Languages: 3 languages will be available for interpretation (EN, FR, DE)

### **Steering committee meeting #5**

- Final meeting of the steering committee in May/June 2016 to review and evaluate the project, its outcomes and further dissemination of the findings and other applicable follow-up.

<b>Provisional Calendar of activities</b>	
<b>2014</b>	
June	Launch of Call for Tender
September	Selection of subcontracted expert
October	Kick-off Steering Committee Meeting #1 with subcontracted expert
October/November	Research for preparation of country reports conducted by subcontracted experts
December	Steering Committee Meeting #2 with subcontracted expert
<b>2015</b>	
February – December	Cluster seminars in target countries
Summer	Steering Committee Meeting #3 with subcontracted expert
December	Steering Committee Meeting #4 with subcontracted expert
<b>2016</b>	
March	Final employers' conference in Brussels
April/June	European social partners' joint conference
May/June	Steering Committee Meeting #5 with subcontracted expert

## **1.6 Organisation**

For the implementation of this project, an expert will be contracted for an estimated 80 days' expertise:

- He/she will discuss the methodology for the preparation of the country reports with the steering committee and based on this will make a proposal for conducting the initial research and the structure of the country reports.
- He/she is responsible for preparing the fifteen draft country reports, which will be the main deliverable from the first phase of the project. Following the respective cluster seminars and the comments made at these events he/she will update the individual country reports. He/she will also prepare a final report for presentation at a concluding conference in Brussels. This report will be prepared in coordination with the steering committee and should be submitted to the committee for validation approval prior to the conclusion of the overall project. The final report should be +/- 50 pages.

- In constant liaison with BUSINESSEUROPE, he/she will work under the control and supervision of a steering committee.

Please refer to the subcontractor terms of reference (Section below) for a more detailed description of the experts' tasks and deliverables.

## 1.7 Description of project partnership

This project is managed by BUSINESSEUROPE on behalf of the EU cross-industry employers' organisations CEEP, and UEAPME. The following organisations will also participate: European Roundtable of Industrialists, EUROCOMMERCE, CEEMET, Digital Europe, EUproVET, EFVET.

The partners will provide expertise for the project components, steering committee meetings and the EU-level conference in Brussels.

## 2. PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European employers' social partner organisations entitled "***The cost effectiveness of apprenticeship schemes – making the business case for apprenticeships***".

In order to ensure a large visibility for this tender, BUSINESSEUROPE, CEEP, UEAPME will publish the tender specifications on their websites; they will each keep the tender online for one month.

## 3. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

The subcontractor should provide the following services for the applicant organisations:

For the kick-off steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to propose a detailed methodology for the preparatory phase coherent with the aims set in the project description and in line with the aims of the project (above);
- to present a preliminary draft of the structure of the country reports (2-3 pages).

For the background research and preparation of the country reports, the tasks to be performed by the subcontractor are the following:

- General research and desk research on the apprenticeship systems including reforms that are in the process of being implemented in the target countries and apprenticeship opportunities in the selected sectors and occupations, including ongoing and past projects carried out by the project partners' affiliates (if any);
- Collect examples of best practices and identify the situation of policy frameworks in the target different countries;
- The country reports are to be considered a work in progress as they may be revised following the discussions at the cluster seminars;
- The subcontractor will have at his/her disposal the possibility to undertake funded visits to the target countries to organise face-to-face meetings with relevant

stakeholders to complement desk research, if and as required. These visits are part of the 40 days allocated to the subcontractor for the preparatory phase of the project, including proposing the methodology, initial desk research, conducting interviews and face-to face meetings with national stakeholders, drafting of fifteen country reports (10-15 pages);

- A bibliography of literature and technical documents used and reviewed should be appended to the country reports.

For the second steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to present the results of the preparatory phase and key themes identified across the country reports;
- to advise on the issues that could be addressed in the cluster seminars taking into account the content of the country reports;

For the third steering committee meeting, the tasks to be performed by the subcontractor are the following:

- To assess the first set of cluster seminars and the reaction to the country reports and advise whether modifications could be made to the structure of the seminars/reports for the remaining events.

For the fourth steering committee meeting, the tasks to be performed by the subcontractor are the following:

- To evaluate the series of cluster seminars and to advise on final adaptations to the country reports
- to discuss the preparation and structure of the final report and the final conference

For the final employers' conference the subcontractor will participate in the conference to present the final report. The subcontractor will also present the report at the joint conference organised by the European social partners.

For the final report, for which the subcontractor will have 23 days to prepare, the tasks of the subcontractor are the following:

- to prepare the draft report (+/- 50 pages), which should make use of the findings of the country reports and discussions at the cluster seminars to draw together some conclusions and recommendations on improving the cost effectiveness of apprenticeship systems and employer engagement in them;
- to ensure that the final report is user friendly and in line with the overall objective of the project.

For the fifth steering committee meeting, the tasks to be performed by the subcontractor are the following:

- To give an overall assessment of the project and to advise on further possible actions for disseminating the findings and taking forward the actions points

### Travel Fund

The subcontractor and his/her team will have the possibility to travel to the target countries for background interviews with relevant stakeholders. This fund will allow travel

for 1 person for up to 2 days at a time for up to 20 country visits. Whether or not all countries would need to be visited would be at the discretion of the subcontractor.

## 4. EXPERTISE AND EXPERIENCE REQUIRED

### **Subcontractor**

Sound experience is required in the following areas:

- Successful track record in delivering research-based projects over a long time frame (+12 months);
- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. interviews, questionnaire, desk research, survey, literature review, European events, conferences, seminars);
- Expertise of working on large-scale international projects, preferably on the issue of apprenticeships;
- Strong project management, research and analytical skills;
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is also required on the following issues:

- Expertise on apprenticeship systems;
- Technical knowledge of how apprenticeship systems are designed and implemented as well as knowledge of the specific issue of their cost-effectiveness;
- Expert knowledge of apprenticeship systems within education and training schemes seen in the context of labour market skills needs;
- Ability to inform and advise on strategic priorities with regard to the cost-effectiveness of apprenticeship systems;
- Ability to identify and analyse issues in the area of apprenticeships currently faced by companies and employers' organisations in Europe;
- The bidder must specify in his/her application whether he/she will work alone or with a team and how many people are in the team. He/she must also send their CV as well as those of any team members.

## 5. TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01/09/2014 or 01/10/2014 to 30/08/2016.

The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

The subcontractor will be asked to work 80 days, of which:

- 17 days are required for attending the associated meetings, including the steering meetings (5), cluster seminars (10) and EU-level conference (2);
- 40 days are considered necessary for the preparatory phase of the project, including proposing the methodology, initial desk research, conducting interviews and face-to face meetings with national stakeholders, drafting of fifteen country reports, and a final report (+/- 50 pages) to be presented during the EU-level conference;

- 23 days are considered necessary for finalising the fifteen country reports after the seminars and preparing and drafting the final report (+/- 50 pages).

## 6. PAYMENT

The total maximum budget available for expertise is as follows:

<b>Contract with BUSINESSSEUROPE</b>		
<ul style="list-style-type: none"> <li>➤ Steering Committee meeting # 1</li> <li>➤ Preparatory phase, background research and desk research</li> <li>➤ Interviews and documentary analysis</li> <li>➤ Steering Committee meeting # 2</li> <li>➤ Preparation of fifteen country reports</li> <li>➤ Cluster seminars</li> <li>➤ Steering Committee meeting # 3 (during period when cluster seminars take place)</li> <li>➤ Steering Committee meeting # 4 (at end of cluster seminars)</li> <li>➤ Preparation final report</li> <li>➤ Final employers' conference</li> <li>➤ Steering Committee meeting # 5</li> </ul>		
Daily rate	Days of work	€
€ 750	x 80 days	60,000
<b>TOTAL € 60,000</b>		

In accordance with the above table, the subcontractor will enter into a contract with BUSINESSSEUROPE for a total of € 60,000 (**all taxes included**).

Upon invoice the subcontractor will receive an advance, interim and final payment.

## 7. PRICE

**Contract with BUSINESSSEUROPE:**            € 60,000.

**TOTAL:**    € 60,000.

## 8. SELECTION CRITERIA

The offers will be examined against the following criteria:

- Ability to formulate and carry out a tailored methodology in tune with the project's objective of exploring and analysing the cost effectiveness of various national apprenticeship systems in the EU;
- Experience in coordinating a variety of actions, running and animating large-scale international events, preferably in the area of apprenticeships;
- Proven track record of ensuring the quality of written materials prepared, both in terms of content and format (i.e. deliver publishable documents);
- Expert knowledge of apprenticeship systems within education and training schemes seen in the context of labour market skills needs;
- Ability to identify and analyse issues in the area of apprenticeships currently faced by employer social partners and companies in Europe;
- Project management experience (essential);
- Successful track record in delivering research-based projects over a long time frame (+12 months);
- Ability to conduct meetings and draft all documents in English;
- Good administrative skills;
- Respect of deadlines;
- Respect of the budgetary constraints.

## 9. AWARD CRITERIA

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

## 10. CONTENT AND SELECTION OF THE BIDS

Offers must be received within 60 days of the date of publication of this call for tender by BUSINESSEUROPE, i.e. by 22 August 2014. Offers must be sent to BUSINESSEUROPE (see contact address below).

To ensure confidentiality, **bidders must submit their offer in a sealed envelope and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "Tender – not to be opened by the Mail Department" (Appel d'offre – à ne pas ouvrir par le service du courrier)**. If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising three representatives of the European employers' social partners (BUSINESSEUROPE, CEEP and UEAPME). One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to:

<p><b>BUSINESSEUROPE</b> Maxime Cerutti Director Social Affairs Department Avenue de Cortenbergh 168 B – 1000 Brussels BELGIUM</p>
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For requests sent by registered mail, the postmark will serve as proof of the date of dispatch.

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