

# **Tender specifications**

## **Call for tender VT/2014/061**

**Service contract for measures to enhance cooperation between Public Employment Services (PES), in particular services to implement a 'benchlearning' concept within the network of PES.**

## Table of contents

<b>Technical part</b> .....	4
1. Title of the contract.....	4
2. Background .....	4
3. Subject of the contract .....	5
4. Tasks to be carried out by the contractor(s) .....	9
4.1. Lot 1: Assessing PES performance and comparative analysis of PES data in order to provide evidence for the identification of good practices.....	9
4.2. Lot 2. Foster mutual learning among PES and support the implementation of good practices in PES – PES 2 PES dialogue II .....	15
5. Time schedule and reporting .....	23
5.1. Time schedule .....	23
5.2. Reporting.....	24
6. Price .....	25
6.1. Protocol and taxes applicable.....	25
7. Payments and contract .....	26
<b>Administrative part</b> .....	27
8. Participation.....	27
8.1 Participation to the procedure.....	27
8.2 Contractual conditions .....	27
8.3 Sub-contracting.....	27
9. Joint tenders.....	27
10. Exclusion criteria and supporting documents .....	28
11. Selection criteria .....	29
11.1 Economic and financial capacity and evidence .....	29
11.2 Technical and professional capacity criteria and evidence.....	30
12. Award criteria .....	32
13. Content and presentation of offers .....	33
13.1 Content of bids .....	33
13.2. Presentation of bids.....	35

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## **Technical part**

### **1. Title of the contract**

**VT/2014/061 - Service contract for measures to enhance cooperation between Public Employment Services (PES), in particular services to implement a 'benchlearning' concept within the network of PES.**

This service contract will put into practice the 'benchlearning' concept as defined by the legislator in the PES Decision<sup>1</sup>; benchlearning is an innovative concept to define evidence-based learning by combining quantitative and qualitative benchmarking, mutual learning and support to implementation of good PES practices. The 'benchlearning' concept integrates a strong analytical and assessment part to identify good PES practices that will become the evidence base for mutual learning.

The tender is divided into 2 lots:

Lot 1: Assessing PES performance and comparative analysis of PES data in order to provide evidence for the identification of good practices

Lot 2: Foster mutual learning among PES and support the implementation of good practices in PES

Tenders may be submitted for one or both lots. Tenderers should submit their bids separately for each lot as each lot will be evaluated independently.

### **2. Background**

#### **Introduction on the Programme**

The European Programme for Employment and Social Innovation "EaSI" 2014-2020<sup>2</sup> is a European-level financing instrument managed directly by the European Commission to contribute to the implementation of the Europe 2020 strategy, by providing financial support for the Union's objectives in terms of promoting a high level of quality and sustainable employment, guaranteeing adequate and decent social protection, combating social exclusion and poverty and improving working conditions.

#### **General requirement on issues to consider for the activities funded under EaSI**

##### **Source of funding**

Beneficiaries/contractors must acknowledge in writing that the project has been supported by the **European Union Programme for Employment and Social Innovation ("EaSI") 2014-2020**. In practice, all products (publications, brochures, press releases, videos, CDs, posters and banners, and especially those associated with conferences, seminars and information campaigns) must state the following:

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<sup>1</sup> Decision 573/2014/EU of 15 May 2014; OJ L159 of 28. May 2014

<sup>2</sup> <http://ec.europa.eu/social/main.jsp?langId=en&catId=1081>

*This (publication, conference, video, xxx) has received financial support from the European Union Programme for Employment and Social Innovation "EaSI" (2014-2020). For further information please consult: <http://ec.europa.eu/social/easi>*

The European emblem must appear on every publication or other material produced. Please see: [http://ec.europa.eu/dgs/communication/services/visual\\_identity/pdf/use-emblem\\_en.pdf](http://ec.europa.eu/dgs/communication/services/visual_identity/pdf/use-emblem_en.pdf)

Every publication must include the following:

*The information contained in this publication does not necessarily reflect the official position of the European Commission.*

### **Guide and details of how the tasks shall be carried out**

Following to be inserted (after the description of objectives/tasks):

The EaSI Programme shall, in all its axes and actions, aim to:

- (a) pay particular attention to vulnerable groups, such as young people;
- (b) promote equality between women and men,
- (c) combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation;
- (d) promote a high-level of quality and sustainable employment, guarantee adequate and decent social protection, combat long-term unemployment and fight against poverty and social exclusion.

Hence, in designing, implementing and reporting on the activity, beneficiaries/contractors must address the issues noted above and will be required to provide detail, in the final activity report on the steps and achievements made towards addressing those aims.

### **Monitoring information**

The Commission, with the support of an external contractor, will monitor regularly the EaSI Programme. Therefore, beneficiaries/contractors will have to transmit qualitative and quantitative monitoring data on the results of the activities. These will include the extent to which the principles of equality between women and men has been applied, as well as how anti-discrimination considerations, including accessibility issues, have been addressed through the activities. Related templates are attached or will be provided.

In setting up the action, beneficiaries/contractors must foresee the necessary funding for monitoring and reporting to the Commission.

## **3. Subject of the contract**

The purpose of this Service Contract is to assist the Commission in its task to implement the decision on enhanced co-operation between Public Employment Services (PES)<sup>3</sup> and other related activities to foster cooperation between PES thereby improving the quality and quantity of PES services on the ground throughout the Union in line with the objectives of the Europe 2020 strategy.

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<sup>3</sup> Decision 573/2014/EU of 15 May 2014; OJ L159 of 28. May 2014

PES have a critical role to play in the implementation of the European Employment Strategy. This is recognised by the Employment Guidelines<sup>4</sup>, with the PES delivery role being particularly central in giving substance to priorities set down in Guidelines 7 and 8

Improving services to young jobseekers will be one of the main challenges for the next years given the key role given to PES in the implementation of the Council Recommendation on "Establishing a Youth Guarantee", adopted in April 2013<sup>5</sup>. PES capacity to implement the Youth Guarantee varies strongly across the Union as shown by the HoPES Assessment Report<sup>6</sup> on PES capacities to implement the Youth Guarantee.

Within the process of the European Semester in 2014, a number of Member States have received Country Specific Recommendations (CSRs) with regard to PES performance and delivery, including specific PES performance and delivery aspects such as improving PES capacity, efficiency and effectiveness, the provision of individualised services, introducing a performance measurement system, etc.

The network of Public Employment Services, on the basis of the decision on enhanced co-operation between PES has been launched in June 2014. The initiatives foreseen under the decision will be implemented subsequently. The main initiative and subject of this procurement is the implementation of the evidence-based benchlearning among PES to compare, with appropriate methodology, the performance of their activities. For the purposes of this tender, 'benchlearning' means the process of creating a systematic and integrated link between benchmarking and mutual learning activities, that consists of identifying good performances through indicator-based benchmarking systems, including data collection, data validation, data consolidation and assessments, with appropriate methodology, and of using findings for tangible and evidence-informed mutual learning activities, including good or best practice models.

The overarching reason for benchlearning is to help each PES improve its own performance through a structured and systematic reflection on its own performance and how it has been achieved. Exogenous factors, primarily, labour market conditions, the nature of PES mandates, and institutional settings, will inevitably have a considerable bearing on PES performance. However strategic management decisions, business design criteria, and the nature of operational processes, can all have positive or negative consequences for the successful delivery of employment policy. A deeper analysis should serve to detect those elements (performance enablers or drivers) that are potentially causing differences in performance, thus identifying organizational factors, drivers and practices that correlate with better outcomes.

The existing Mutual Learning Programme (PES-to-PES-Dialogue)<sup>7</sup> provides a sound and tested pre-existing structure which can be utilised to systematically investigate the impact on PES performance of specific enablers and drivers. As benchlearning matures the possibility of drawing some causal links between endogenous factors and benchmarking outcomes can offer PES an evidence base that can be used when considering reform of their delivery mechanisms.

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<sup>4</sup> <http://ec.europa.eu/social/main.jsp?catId=101&intPageId=1471&langId=en>

<sup>5</sup> Council Recommendations of 22 April 2013 on establishing a Youth Guarantee; 2013/C 120/01

<sup>6</sup> HoPES Assessment Report on PES Capacities to implement the Youth Guarantee, October 2013

<sup>7</sup> <http://ec.europa.eu/social/main.jsp?catId=964&langId=en>

The previous PES Benchmarking Group (2001-2013)<sup>8</sup> confirmed the need for evidence-based learning. Through consideration of quantitative benchmarking indicators benchmarking will underpin assessment of the PES role in the delivery of EU 2020 Employment Strategy. It also mirrors the developments necessary to realise the PES Strategy 2020<sup>9</sup>. There will need to be an improved linkage between PES network operations and the wider European Employment Policy cycle. The structured assimilation of knowledge from the new PES benchmarking can provide the vehicle to achieve this.

### Main legal framework

The decision of the European Parliament and of the Council on enhanced co-operation between Public Employment Services (PES) aims to strengthen cooperation between the PES of the Member States. PES are responsible for implementing active labour market policies and providing employment services in the public interest. They are part of relevant ministries, public bodies or (non for profit) corporations falling under public law. The services offered by PES to workers and employers include labour market information, support for job search, counselling, vocational guidance, placement and support of occupational and geographic mobility. PES are also frequently in charge of unemployment and other social benefit systems. The efficiency of PES is an essential factor for successful employment policies.

Strengthening cooperation between PES in the EU has been recognised as a crucial element to achieve the employment targets of the Europe 2020 Strategy<sup>10</sup>. The Commission has regularly advocated for the modernisation of PES service delivery, for partnerships between PES and other employment services, and for transforming PES into "transition management agencies" delivering a new combination of "active" and "passive" employment policies<sup>11</sup>. The Council recently called for partnerships between public and private employment services, employers, social partners and youth representatives when delivering youth guarantee schemes<sup>12</sup>. PES are also directly addressed in the current European guidelines for the employment policies of the Member States, the 'employment guidelines'<sup>13</sup>.

Shrinking public budgets and the need for increased PES cost-effectiveness have prompted several Member States to undertake PES reforms in the shape of mergers with unemployment benefit providers, outsourcing of services to private providers, regionalisation and municipalisation of employment services, and enhancing service delivery through ICTs and self-service tools. At the same time, PES expenditure (excluding unemployment benefits) is constantly changing: a regular survey among PES<sup>14</sup> revealed that between 2007 and 2010 expenditure increased, whilst in 2011 it mostly decreased. The latest budget projections show that the majority of PES anticipate higher expenditure in 2013 and 2014 than in the previous years. Due to national diversity in terms of PES business models, instruments, labour market conditions and legal context PES have different levels of effectiveness when delivering labour market programs. While Member States remain responsible for organising, staffing and

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<sup>8</sup> <http://www.pes-benchmarking.eu/english/about.asp?IdPageLv=1>

<sup>9</sup> <http://ec.europa.eu/social/main.jsp?catId=105&langId=en>

<sup>10</sup> Communication from the Commission, Europe 2020, a strategy for smart, sustainable and inclusive growth, COM(2010) 2020 final

<sup>11</sup> Communication from the Commission, An Agenda for new skills and jobs: A European contribution towards full employment, COM (2010) 682 final, Communication from the Commission "Towards a job-rich recovery", COM(2012) 173 final

<sup>12</sup> EPSCO conclusions 28 February 2013

<sup>13</sup> Council decision on guidelines for the employment policies of the Member States, 2010/707/EU, 21 October 2010

<sup>14</sup> PES Crisis response questionnaire 2010-2013, European Job Mobility Laboratory

running their PES, the PES decision establishes a European Network of Public Employment Services providing a platform for comparing their performance at European level, identifying good practices and fostering mutual learning in order to strengthen service capacity and efficiency. Experience has shown that Member States do not engage sufficiently in mutual learning and benchmarking activities by themselves.

PES are required to adapt their organisation models, business strategies and processes to a rapidly changing labour market if they are to become "learning organisations" and contribute to the work of the Employment Committee. In its recent document "PES Strategy EU 2020"<sup>15</sup> – the PES Network identified five key areas for change to achieve the goals of the Europe 2020 strategy. i) connect with the demand side; ii) adopt a conductor role by cooperation/partnerships; iii) develop skills oriented operations; iv) pursue sustainable activation outcomes v) improve careers.

The decision on enhanced co-operation between PES defines the A: Benchmarking indicators and B: Areas of benchmarking through qualitative internal and external assessment of performance enablers:

- A: 1) Contribution to reducing unemployment for all age groups and for vulnerable groups:
- a) Transition from unemployment into employment per age group, gender and qualification level, as a share of the stock of registered unemployed persons;
  - b) Number of people leaving the PES unemployment records, as a share of registered unemployed persons.
- 2) Contribution to reducing the duration of unemployment and reducing inactivity, so as to address long-term and structural unemployment, as well as social exclusion:
- a) Transition into employment within, for example, 6 and 12 months of unemployment per age group, gender and qualification level, as a share of all PES register transitions into employment ;
  - b) Entries into a PES register of previously inactive persons, as a share of all entries into that PES register per age group and gender.
- 3) Filling of vacancies (including through voluntary labour mobility):
- a) Job vacancies filled;
  - b) Answers to Eurostat's Labour Force Survey on the contribution of PES to the finding of the respondent's current job.
- 4) Customer satisfaction with PES services:
- a) Overall satisfaction of jobseekers;
  - b) Overall satisfaction of employers.

B. Areas of benchmarking through qualitative internal and external assessment of performance enablers:

- 1) Strategic performance management;
- 2) Design of operational processes such as effective channeling and profiling of jobseekers and tailored use of active labour market instruments;
- 3) Sustainable activation and management of transitions;
- 4) Relations to employers;
- 5) Evidence-based design and implementation of PES services;
- 6) Effective management of partnerships with stakeholders;
- 7) Allocation of PES resources.

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<sup>15</sup> Public Employment Services' Contribution to EU 2020, PES 2020 Strategy Output Paper, 2012

Furthermore, the decision stipulates that the technical framework for the delivery of the benchmarking and mutual learning activities will be agreed by the PES network as part of the annual work programme of the Network. This technical framework includes the benchmarking methodology on the basis of the benchmarking indicators as set out in the Annex to the PES Decision to compare PES performance, the context variables, the data delivery requirements, and the learning instruments of the integrated mutual learning programme. This tender "Service contract for measures to enhance cooperation between Public Employment Services (PES), in particular services to implement a benchmarking concept within the network of PES" reflects the technical framework as elaborated by the PES network in summer 2014; the technical framework is subject to revisions during the duration of the awarded contracts.

## **4. Tasks to be carried out by the contractor(s)**

### **4.1. Lot 1: Assessing PES performance and comparative analysis of PES data in order to provide evidence for the identification of good practices**

#### **4.1.1. Task 1: Collecting and analysing data**

The main inputs for the maximum 20 indicators to be used for the assessment are PES administrative data, Eurostat data including Labour Force Survey (LFS), and other data sources fit for purpose. Where suitable the contractor will, in addition to the PES administrative data, gather LFS data or other relevant EU level data for the defined indicators; it is estimated that for around 10 indicators an analysis of both PES administrative data and other data sources will become necessary. In addition to this, 10-12 context variables – defined in cooperation with the PES network - may be used in the benchmarking process.

The contractor shall carry out the following sub-tasks:

- a) Collecting data with time series starting in 2010, for example by using a tool with a secure online access for the annual data input and data consultation by the PES. Support to countries during the data collection (technical and methodological advice), monitor progress of the data collection, backwards revision (retro-active) of time series wherever possible to improve completeness and ensure comparability.
- b) Development of a methodology for data validation and data consolidation in order to improve comparability and reliability over time, checking the data received to be in line with the benchmarking methodology, alignment to national reports, perform logical tests as well as quality analyses, both on the new data submitted for the reference year to which the data collection refers and on the available time series, improve completeness and comparability of the data wherever necessary, contact PES to clarify the questions that come up during the validation process, provide to the Commission, upon request, a state of play mentioning for each country what steps have been performed and the pending actions.
- c) Development of a methodology for the production of the overall PES benchmarking comparative statistics including assessment, comparison and analysis of data per indicator, PES, topic and other suitable criteria, including combinations of indicators and contextual variables. The methodology will include a method for comparing performance data in the context of the framework conditions in which each PES operates as a basis for the comparison of the PES between each other. The comparative methodology will include the development and testing of



multidimensional indices, benchmarks and scales, analysis of the correlations and causal links between the different indicators and between the quantitative and the qualitative assessment (See 4.1.2, Task 2a).

- d) Provide an annual report, with statistical annex, comparing PES performance on quantitative level, indicating whether individual PES are improving, have stable or worsen their performance over time and what is the position of PES in a comparative perspective against the EU average or other defined indices, etc. This should be done in adequate visual presentation such as maps, motion charts, treemaps, tag clouds, stackgraphs, bubble charts, etc.
- e) Up to 5 ad-hoc reports on specific topics at the request of the Commission, not exceeding 20 pages should be delivered within 2 weeks as from the time of the request; produce up to 4 working papers for the PES working group benchlearning on methodological developments per year. Results and data in the different reports and papers should be visualised in an attractive and easy-to-grasp way.
- f) Store reports, working papers, and if appropriate data sheets in a PES extranet that will be developed by the Commission under a different contract at a later stage and cooperate with the different contractors working for the Commission for the implementation of the benchlearning concept.
- g) The practical details of the delivery of the reports, working papers and data sheets will be agreed with the Commission in the annual work programme of the contract.
- h) Meet the Commission and the PES working group benchlearning on a regular basis to present and discuss findings and draft reports on this basis (see task 3).
- i) Migrating at the end all collected data, analysis, visual presentation, including software purchased under the contract to the Commission.

#### **4.1.2. Task 2: Qualitative assessment on basis of performance enablers and PES site visit**

The data gathered and analysed in Task 1, additional information such as results from the PES Business Model Study, the survey PES adjustment to crisis (both covered through a different contract), WEESP, PES-to-PES Dialogue, etc. will be used as input for the qualitative performance assessment that will be delivered through structured and scored interviews on the basis of the list of performance enablers, around 60 in 7 areas for each PES. In agreement with the PES working group benchlearning the list of performance enablers might be divided in around 30 compulsory core performance enablers and 30 optional that could differ from PES to PES, maintaining a core for comparability. The qualitative performance assessment has the objective to identify non-quantifiable strengths and good practices of a given PES as well as areas for improvement to develop priorities for further action. An integrated approach aims to build up knowledge on the relationships between certain performance enablers (as measured through the qualitative assessment) and outcomes (as measured through quantitative data collection under task 1). Each assessed PES will conduct a self-assessment as basis for discussion with the assessors. 15 site visits or multilateral reviews for the systematic assessment of PES are foreseen per year.

The contractor shall carry out the following sub-tasks:

- a. Test the feasibility and further develop the benchlearning methodology in particular the data gathering methodology, the analytical assessment framework linking performance enablers and indicators, developing and testing causal, logical, statistical or plausible links in cooperation with the PES working group Benchlearning and the Commission.
- b. Develop a pre-visit template for the gathering PES data and information by performance enabler, compile the information from the above-listed sources, enrich it with relevant information from the PES management system delivered by national PES (e.g. case load,

- interview time with clients, frequency how often customers are being seen, etc.), harmonised background data on labour market, economic indicators, context variables, etc. Develop a PES self-assessment template, advise the PES on how to complete it, if necessary and collect results.
- c. Develop an assessment framework of the performance enablers, including a questionnaire and other methodologies in order to conduct a 2 days site visit with contractor's PES experts, (maximum 2) and PES experts (maximum 2) nominated by the PES network, cover travel and accommodation costs of the PES experts nominated by the PES network. Commission representatives may participate in the visits without reimbursement and oversee the process.
  - d. Carry out scored interviews based on the assessment framework in a constructive dialogue with management/experts within the PES, potentially in combination with a short visit to a local agency to receive an impression of processes and structures or parallel interviews to stakeholders, according to a methodology presented in the tender. The tender should include options how some PES site visits could be replaced by a multilateral review at the occasion of the meeting of the PES Benchmarking working group, by videoconferencing or by other means.
  - e. Prepare after each PES assessment an individual PES feedback report integrating all inputs above, only in EN, scoring the PES on the performance enabler indicators and sub-indicators indicating strengths and problem areas commonly agreed in written procedure by the contractor's PES experts and PES experts nominated by PES network, appropriately consolidate the data/information from different sources, deliver combined results from quantitative/qualitative benchmarking to individual PES in form of a comparative feedback report indicating strengths and areas for improvement, indicate evidence-based good practices for the mutual learning programme, provide feedback, if wanted, by contractor's PES expert(s) in form of a video conference meeting to the respective PES management.
  - f. Identification of evidence-based good practices and coordination with the contractor of Lot 2 for their employment in the mutual learning activities: Lot 2 of this tender will focus on fostering mutual learning among PES and providing support the implementation of good practices in PES. The good PES practices identified within Lot 1 will shape the choice of topics under the mutual learning programme. Identified good PES practices from Lot 1 will as well be integrated in the good practice repository WEESP (Webtool for Evaluated Employment Services Practices<sup>16</sup>), hosted by the Commission. It is anticipated that around 15 PES practices per year will be identified under Lot 1. The Lot 1 contractor will prepare the text of the practices to be integrated into WEESP, according to template based on the current WEESP, in English.
  - g. Provide an overall annual report on the general findings (grouped per country, topics and cross-country) and conclusions of the quantitative and qualitative benchmarking, including country-specific sheets and all assessment reports in the annex.
  - h. Set up and coordinate a pool of PES experts (contractors PES experts) and liaise with the PES experts nominated by the network after the award of the contract.

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<sup>16</sup> <http://ec.europa.eu/social/main.jsp?catId=1030&langId=en>

- i. Conduct maximum twice per year two day trainings with PES experts nominated by the PES Network in a group workshop on the methodology of the assessment and the use of the assessment framework. Maintain a collaborative space for interaction between the pool of nominated PES experts and the contractor's PES experts, aiming to ensure a smooth working process for preparation and follow up of the PES site visits.
- j. At the end of the first year of implementation of the benchlearning process, provide a concise methodological report on improvements in the quantitative and the qualitative assessment, including methods for data collection, analysis, new sources of data, presentation of results and feeding into the PES mutual learning process (lot 2 in this call for tender).
- k. For some of the PES site visits interpretation of the scored interviews with management/experts within the PES might be necessary. For this purpose the contractor should foresee simultaneous interpretation services delivered by local interpreters for a maximum of 5 site visits per year. The duration of the site visits will be two days.
- l. Draft the section of the annual report of the PES network related to the benchlearning, including a presentation of the benchlearning methodology, and the main results in adequate visual presentation. The section in the annual report should not exceed 30 pages.

#### **4.1.3. Task 3: Organisation of meetings of PES working group benchlearning**

The Contractor will be in charge of the entire organisation (administrative, logistical, technical) and financing of 2 meetings of the PES benchlearning working group per year.

The contractor shall:

- a. Identify an appropriate venue in Brussels, accessible for disabled participants, reserve a meeting room with a capacity of up to 40 seated participants with tables, handle registration of participants and prepare event packs, handle the reservation and funding of accommodation and travel for up to 40 participants; provide a meal (lunch) plus 2 coffee breaks for all participants, in case of meeting of more than one day, provide meals (lunch + dinner) plus 2 coffee breaks per working day. One of the 2 meetings will be a two days meeting.
- b. Contact potential speakers in agreement with the Commission, draft the meetings programme (English), draft and translate concept papers for the meeting in agreement with the Commission, draft a meeting report of 20 pages maximum in English. This report will have to be delivered 2 weeks after the meeting.

#### **4.1.4. Task 4: Additional analysis: studies, surveys, and ad hoc requests**

Under this task, the contractor is to undertake research into issues that are of direct relevance to actors involved in the provision of mobility and transition related services – in particular employment services. The contractor shall assist the Commission with additional analysis (2 medium scale studies and 2 small scale studies per year) and 2 surveys per year among the members of the PES network.

In addition, up to 3 ad-hoc reports on any labour market or employment services related question/topic may be requested by the Commission at any moment of the contract duration and should then be delivered within fifteen working days. Ad-hoc reports should not exceed 20 pages, when submitted.

The contractor shall:

- a) Develop a sound research methodology for each of the four studies, carry out desk and web research on the topics of the study, conduct a series of case studies, if applicable, to

be included as part of the study, compile and consolidate all the research materials into a clear and accessible document of around 80 pages for medium scale studies and 40 pages for small scale studies.

- b) Coordinate the preparation and development of the studies with the Commission.

The topics of these studies may cover (non-exhaustive list):

- a. PES delivery models
  - b. Active labour market policies,
  - c. Effective approaches aiming at reducing Youth Unemployment
  - d. Partnerships between Employment Services, cooperation and contract management between PES and other relevant service providers for vocational orientation, placement, assessment, guidance, intensive assistance or training such as private employment services, temporary agencies, integration services, social services, careers services, NGOs, local authorities, social partners or private employment services
  - e. Improving skills supply and productivity, lifelong learning
  - f. Job creation and entrepreneurship
  - g. Anticipation of skills needs, skills governance,
  - h. Monitoring of skills demand, occupational demand and corresponding labour supply including educational attainments, occupations showing labour shortages, skills bottlenecks on country basis, hirings data, unemployment per occupation but as well any other labour market topic.
- c) With regard to the surveys among the PES network, draft and test the questionnaire related to benchlearning or other relevant topics that should include maximum 30 questions (open and/or closed), circulate the questionnaire to the PES, assist PES to answer, if required, analyse all responses, prepare a findings report and prepare a Power Point presentation of the main findings.

The details of the medium scale studies, the small scale studies and surveys will be defined in the annual work programme while the details of the ad-hoc requests will not be further defined.

The exact planning of the activities under this lot will be defined in an annual work programme

### **Development of a work plan**

The bid should include a detailed work plan, which will be among the factors governing the award of the contract. The technical proposal should address all matters laid down in the description of the tasks and should include models, examples and solutions to problems raised in the specifications.

In particular, the following aspects should be addressed in the work plan:

- a) A sound methodology on analysing/combining the different quantitative and qualitative benchmarking elements and the other information sources used in order to identify areas for improvement and good practices, taking into account the restricted comparability of results.
- b) A methodology to identify a more robust relationship of certain performance enablers and types of their implementation with certain PES outcomes as measured by the quantitative indicators

- c) Propose alternative means on how to deliver "Task 2: Qualitative assessment on basis of performance enablers and PES site visit". Can the scored interviews or some of them be carried out by videoconferencing? Can the meetings under "Task 3: Organisation of PES meetings with and for the Commission" be used to carry out the scored interviews and use the expertise of the gathered PES benchlearning experts?
- d) Which other sources of information on PES performance can be used in order to enrich the available information and contribute to the identification of good PES practices?
- e) Propose a methodology for the identification of good practices.

The tenderer is requested to provide as part of the work plan detailed information of the types of experts proposed and the detailed number of expert days per task and the sub-tasks as indicated below:

- Lot 1 task 2 (points c, d, e), including the types of experts, the detailed number of expert days for tasks preparing, implementation and follow up of the PES site visits.
- Lot 1 task 4 (point a but only for 2 medium scale studies and 2 small scale studies)

Task/N° of days	Total N° of person/days per level qualification I	Total N° of person/days per level qualification II	Total N° of person/days per level qualification III	Total N° of person/days per level qualification IV
Lot 1 Task 1				
Lot 1 Task 2				
Tasks 2 c,d,e, PES site visit				
Lot 1 Task 3				
Lot 1 Task 4				
Task a: 2 medium-scale studies				
Task a: 2 small-scale-studies				
...				
Total				

### Core team of experts

In order to carry out the tasks under Lot 1, the Contractor should propose a project manager and a core team of two persons with the relevant expertise, responsible for the day-today management of the Contract (see 11.2 of the tender specifications).

### Set up and coordinate of a multidisciplinary additional pool of experts

The contractor is to set up a pool of PES experts and PES researchers, labour market experts and researchers and supervise their work described under the tasks of Lot 1 of this tender. This includes:

- a) Qualitative assessment on basis of performance enablers and PES site visit,
- b) Data collection and data storage of PES administrative data and EU level data,

- c) Development of a methodology for data validation and data consolidation,
- d) Development of a methodology for the production of the overall PES benchmarking statistics including assessment and analysis of data per indicator
- e) Further develop the benchlearning methodology in particular the analytical assessment framework linking performance enablers and indicators including contributions to the corresponding mutual learning activities.
- f) Develop an assessment framework based on performance enablers and other relevant information, conduct the site visit with contractor's PES experts
- g) Research, analysis and assessment of actual and potential contributions of PES to the objectives of the EU 2020 Strategy, including development and monitoring of studies on these aspects,
- h) Contribution to the analysis, from the angle of PES, of the Member States National Reform Programmes and the follow up of country-specific recommendations related to PES and ALMP
- i) Operational support to the functioning of the PES network, including through organisation, coordination, and follow up of meetings, seminars, conferences, and specific projects and support towards the PES network annual work programme
- j) Consolidation and analysis of information on job vacancies, short term labour market changes and projections on required skills,
- k) Following up developments of cooperation between PES and Private Employment Services
- l) Contribution towards the evaluation, launch, monitoring and ex-post assessment of the benchlearning project
- m) Handling "ad-hoc requests" for analysis of PES issues, overall employment and labour-market related issues falling outside the 'normal deliverables' of the benchlearning; this refers in particular to the task 4.

## **4.2. Lot 2. Foster mutual learning among PES and support the implementation of good practices in PES – PES 2 PES dialogue II**

### **4.2.1. Task 1. Mutual learning events**

The contractor will be in charge of the development of the learning methodology and the organisation of events (workshops, seminars and conferences) of the mutual learning activities of the PES network under the supervision of the Commission. Under this task, two thematic review workshops, one seminar and two conferences are foreseen per year, depending on the annual work programme of the PES network and political priorities. The exact planning of the activities under this lot will be defined in an annual work programme.

The contractor shall carry out the following sub-tasks:

#### **4.2.1.1. Support for thematic review workshops**

Under this sub-task, the contractor will organise 2 thematic review meetings per year hosted in one of the Member States. Following each thematic visit, one follow-up visit may be organised depending on the findings of the thematic review to explore additional good practice or to assist a country which introduces a measure with insight from other PES more advanced in the area.

Under this sub-task, the contractor will:

- a) Identify, liaise and arrange the presence of a PES expert who will prepare a pre-questionnaire/form to the participating PES, identify the main questions, draft a discussion

paper (5-10 pages) based on inputs received from each participating PES, on existing evidence and previous network outputs. The contractor will suggest a learning methodology, prepare a programme based on dialogue with the Commission and the hosting PES, prepare briefings for speakers and chairs. The contractor will attend, facilitate and provide minutes of the meetings.

- b) Prepare meeting reports: an executive summary of 2 pages to be delivered in 7 days and a 10 pages report summarising the meeting in 14 days following the event.
- c) Draft an analytical paper summarising all the findings, including two to four good practice fiches (2-4 pages) to be submitted within one month of the meeting, on the basis of existing reports and evaluations and additional information provided by the concerned PES. If necessary, translation of material in preparation of the good practice fiches.
- d) Prepare the publication on the PES Network Web pages run by the Commission and hosted on a Commission server of all materials and presentation of the workshop, updating of thematic pages within one month of the meeting.
- e) Full logistic support, including liaising and correspondence with participants/speakers, handle the reservation of and finance the accommodation and travel for up to 25 participants; workshop packages, interpretation from and towards the language of the organising PES to EN provided by local interpreters on request. 25 participants are expected per thematic review workshop.

Organise a follow-up visit:

- f) Identify the PES expert facilitating the follow-up visit, prepare pre-questionnaire/form to participating PES, identify main questions for the follow-up visit, prepare programme of the visit, facilitate and document meetings.
- g) Full logistic support, including liaising and correspondence with maximum 10 participants/speakers, collaborative workspace on the Network's intranet (once in place), accommodation and travel arrangements for participants and speakers, identify an appropriate venue, accessible for disabled participants provide a meal (lunch) plus 2 coffee breaks for all participants. 5 to 10 participants are expected for each visit.
- h) Draft one to two good practice fiches based on the findings of the follow up visit and on existing evaluation material (2-4 pages each) to be submitted within one month of the visit.
- i) Prepare the publication on the PES Network Web pages run by the Commission and hosted on a Commission server of all materials and presentations from the visit and of the good practice fiches, including updating of thematic pages (see task 4) within one month of the meeting.

Depending on the findings of the thematic workshops, two follow-up visits are foreseen per year.

#### 4.2.1.2. Support for PES Network seminars

Under this sub-task, the contractor will:

- a) Provide full logistic support, handle the reservation of and finance the accommodation and travel for up to 50 participants, arrange venue (3 or 4 star hotel, accessible for participants with disabilities, meeting room with capacity of 50 participants with tables and additional workshop room(s)), rental and operation of technical facilities. In general, the venue of the seminars will be Brussels, 1 PES network seminar is foreseen per year.
- b) Ensure liaising and correspondence with participants/speakers, compiling lists of participants, seminar packages, providing access to and animating a collaborative workspace on the Network's extranet, accommodation and travel expenses for

- participants and for speakers, interpretation from and towards English/French/German on request.
- c) Prepare a programme based on dialogue with the Commission, facilitate and document plenary sessions and workshops, prepare briefings for speakers and chairs.
  - j) Prepare a background discussion paper(s) (15-20 pages) identifying the main questions, summarising existing evidence including comparative / non-EU evidence, documenting existing practices and previous results from Network activities.
  - k) Attend meetings and prepare meeting reports: an executive summary in the format of a press release to be delivered in 7 days and a 10 pages report summarising the meeting.
  - l) Draft an analytical paper summarising all the findings, including three to six good practice fiches (2-4 pages each) to be submitted within one month of the meeting. If necessary, translation of material in preparation of the good practice fiches.
  - m) Prepare the publication on the PES Network web pages of all materials and presentations of the seminar and of the meeting report and good practice fiches, including updating of thematic pages within one month of the meeting.

#### 4.2.1.3. Support for two PES Network conferences per year

Under this sub-task, the contractor will:

- a) Provide full logistic support and, including arranging venue (3 or 4 star hotel, accessible for participants with disabilities, meeting room with capacity of 80 to 120 participants with tables and additional workshop room(s)), rental and operation of technical facilities, interpretation services in English, French and German and one additional language that may change.
- b) For one conference handle the reservation of and finance the accommodation and travel for up to 80 participants, for the other handle the reservation of and finance the accommodation and travel for up to 120 participants;
- c) Ensure liaising and correspondence with participants/speakers, compiling lists of participants, profiles of speakers, conference packages, accommodation and travel expenses for speakers. Following the prior agreement of the Commission, identify, liaise and arrange the presence of one to three thematic experts who will be involved in drafting the background conference paper and as speakers in the conferences.
- d) Attend, facilitate and document plenary sessions and workshops, prepare briefings for speakers and chairs.
- e) Prepare a background discussion paper(s) (15-20 pages) identifying the main questions, summarising existing evidence including comparative EU and non-EU evidence, documenting existing practices and previous results from Network activities. Prepare short discussion papers for each workshop and briefings for speakers and chairs.
- f) Prepare meeting reports: an executive summary in the format of a press release and a 5 pages report summarising the meeting to be delivered in 7 days following the meeting.
- g) Draft an analytical paper (25 pages) synthesising the findings and using the evidence from the background paper, including two to four good practice fiches (2-4 pages) to be submitted within one month of the meeting. If necessary, translation of material in preparation of the good practice fiches.
- h) Prepare the publication on the PES Network web pages of all materials and presentation of the conferences, including updating of thematic pages within one month of the meeting.

#### 4.2.2. Task 2. Support to working groups of the PES network and individual PES counselling



The contractor will be in charge with the full analytical and logistical support for the activities of the working groups of the PES network. The contractor shall carry out the following sub-tasks under the supervision of the Commission.

#### 4.2.2.1. Support to working groups of the European PES network

Under this task, the contractor will support all working groups of the European PES network, with the exception of the Benchlearning group (see Lot 1, task 3). Each working group will indicatively comprise 10 participants from different Member States. The meetings of the working groups will take place as a rule in Brussels. It is anticipated that most meetings will take place in Commission premises; up to 3 meetings will take place outside Commission premises. The tenderer will propose suitable facilities and cover related costs. Additional ad-hoc working groups comprising up to 5 participants may be supported, depending on the work programme of the Network.

- a) Ensure liaising and correspondence with participants, compiling lists of participants, providing access to a Network's extranet (once in place), travel arrangements for participants.
- b) Attend the meetings of the working groups, draft background documents upon request, draft minutes of the meetings and draft the final reports of the working groups.
- c) Support the gathering and analysis of data and information from the participating PES and consolidating such findings in brief analytical reports (20 pages). On the basis of the activities and of the inputs of the working groups, draft good practice fiches (2-4 pages). Prepare the final report of the working group and the good practice fiches produced for publication on the PES network's web pages hosted by the Commission.
- d) In agreement with the Commission, identify, liaise and arrange the presence of thematic experts who will be involved in drafting the background documents. Draft minutes of the meetings.

#### 4.2.2.2. Support to mutual assistance projects through individual PES counselling

- a) The contractor may be required to provide PES expert support for providing individual or group PES counselling as part of mutual assistance projects developed within the network. The role of experts will be to contribute to methodology development, organisational analysis, strategic target setting, participation in the design, evaluation or review of an action plan to improve PES performance etc. The contractor may be required to provide a team of experts, both from the contractor's staff, independent sub-contracted experts.
- b) The contractor will arrange in cooperation with the PES concerned the organisation of the counselling, including travel, accommodation, meeting preparation, facilitation and documenting and, if required by the Commission, interpretation from and towards the host PES language and optionally one additional language. Indicatively, two three-day missions to the country concerned for one senior and one other expert and attendance of two additional one day follow-up meetings can be included in the counselling. Such activities may be supported by a PES ad-hoc working group (Task 2.1). Up to 3 PES network experts might join the mutual assistance meetings; their travel/accommodation should be covered. The contractor will document the counselling and will produce a synthesis report providing operational guidance to the PES concerned, as well as broader recommendations and reflection on the organisation of mutual assistance projects.
- c) The contractor will also arrange and cover travel and accommodation costs of 5 European travels of PES network members for participation in meetings, conference, etc.

The number of working groups to be supported will be defined in the annual work programme of the PES network. Indicatively, two working groups meeting five times a year can be expected. Mutual assistance projects will be defined in the annual work programme of the PES network. Indicatively, two Mutual assistance projects are foreseen per year.

#### 4.2.2.3. Research and drafting analytical papers, practitioner's toolkits, evaluation of activities and reports

Analytical papers and practitioners' toolkits will be drafted by PES experts either from the contractor's team, pool of experts or sub-contracted by the contractor, identified for the prior agreement of the Commission. Under this task, the contractor will conduct the following sub-tasks:

- a) Draft analytical papers reviewing existing academic literature and international and national policy reports on a theme, presenting the main challenges, the corresponding policy context, highlighting the main policy and operational choices available, bringing an international, comparative perspective, propose a selected biography and give examples of PES interventions to address the issue under discussion. They should be 25-30 pages long and be based, in addition of available research and reports on interviews and case studies from 3-5 PES.
- b) Based on accumulated evidence from previous events and papers and best practice results, produce practitioner's toolkits. Toolkits will be approximately 30 pages long, including checklists and step-by-step guides, as well as the main resources, elements of design (main actions, role of types of actors, management structures, organisation and timeline, resources, goalposts), critical questions for implementation, the design of monitoring and evaluation. As an option at a later stage when the PES networks extranet is in place, the toolkits may be designed as e-books or as interactive e-learning web pages using appropriate graphical design. They may also be disseminated as webinars or as e-learning kits hosted on the PES Network web pages, translated/ subtitled/ dubbed to key target languages.
- c) Conduct monitoring and evaluation of the overall activities and tasks under this lot, including satisfaction of participants with the events, and once the extranet is in place, satisfaction with the extranet. The evaluation should provide detailed information on stakeholder involvement in the activities of the network. The contractor should draft, apply and centralise the results of a survey of the PES, identifying and quantifying the way the mutual learning activities contributed to changes, new initiatives or reforms within the PES. The evaluation of activities should be done in one a yearly basis and be a basis for the relevant section of the annual report of the PES network.
- d) Draft the section of the annual report of the PES network related to mutual learning activities, including a presentation of the technical framework for the learning instruments of the mutual learning programme, the main results of mutual learning and the mutual assistance projects. The contractor should also include information on the setting up of working groups, their membership and a summary of their activities and reports, as well as information on the Network's cooperation with relevant stakeholders.

Under this task, two analytical papers and three practitioners' toolkits are foreseen per year, depending on the annual work programme of the PES network.

#### **4.2.3. Task 3: Enhancing the web presence of the European PES Network and updating the WEESP repository of good practice**

Core requirements: the contractor should carry out the following sub-tasks in line with technical and editorial COM requirements and in cooperation with the relevant COM services.

4.2.3.1. Develop a common template starting from the existing WEESP templates and provide a methodology for validating the practices, and to integrate the good practice fiches produced in the other tasks under mutual learning lot (lot 2) or under the benchmarking lot (lot 1). It is foreseen that approximately 25 good practice examples from Lot 2 will be introduced every year. The repository should differentiate between practices which were evaluated internally or externally, between those with systematic monitoring of activities or of results and other additional indicators of the strength of evidence.

4.2.3.2. Integrate at short delays the good practice fiches produced as results of previous tasks in the enhanced repository of good practice hosted by the Commission website, which will also integrate the existing WEESP good practice repository. The repository should be open to spontaneous submissions by PES or other stakeholders, which should be integrated by the contractor following validation and editing. All practices should contain executive summaries of 1500 words, tagged and indexed, classified and linked to thematic sub-pages.

4.2.3.3. Create and edit 15-20 thematic subpages<sup>17</sup> to be added to the Commission's PES Network web pages which will act as entry points to relevant resources (reports, e-learning modules, webinars, presentations, input papers to seminars or peer review workshops, summaries of meetings, quantitative data, other reports, EU and national links, etc). The thematic subpages and their dependents should be updated following each relevant event or output related to the theme, on a rolling basis.

4.2.3.4. Integrate on the PES Network sub-pages all resources and information on the activities of the network, add on a regular basis the analytical papers, reports, practitioner's toolkits, conference, seminar and workshop materials.

4.2.3.5. Create an archive of material from the past PES 2 PES programme and on a rolling basis archive materials from past events. In addition, the contractor may be asked to update information in the repository with information on initiatives highlighted in past activities of the network.

4.2.3.6. Provide editorial services, quality assurance, including alignment of terminology and concepts on the web pages and in the repository of good practice (in English). Based on the existing keyword system, optimise the search in the repository of good practice, on the web pages and in the newly created archive of the PES Network and perform search service optimisation.

4.2.3.7. Upon request from the Commission, the following sub-tasks may be delivered in the future; details will be included in the annual work programme:

- A. Develop interactive and user-friendly e-publications to present and use the policy toolkits as e-books or as webinars hosted on the extranet – once in place - or on DG Employment's website.
- B. Plan, development and edit multimedia web contents and integrate them in the web pages of the Network (e.g. 1 hour webinars with graphical support, short 5 minutes videos)
- C. Translation and implementation of new language versions of the website or of the extranet and of its content, including dubbing or subtitles for videos or webinars.

### **Development of a work plan**

The bid should include a detailed work plan, which will be among the factors governing the award of the contract. The technical proposal should address all matters laid down in the

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<sup>17</sup> For an indicative list of themes, see <http://ec.europa.eu/social/main.jsp?catId=964&langId=en>

description of the tasks and should include models, examples and solutions to problems raised in the specifications.

In particular, the following aspects should concisely be addressed in the work plan:

- a) A work plan and methodology for integrating and best exploiting a series of learning tools on a given theme (e.g. employment of older jobseekers). The series of tools should include a thematic review workshop, a conference, an analytical paper, and a practitioner's toolkit within an interval of 2 years.
- b) Propose alternative means on how to deliver "Task 1: Mutual learning events" (1/2 page).
- c) Make a one page proposal on how to increase the user-friendliness, coverage and interactivity of the existing WEESP database

The tenderer is requested to provide as part of the work plan detailed information of the types of experts proposed and the detailed number of expert days per task and the sub-tasks as indicated below:

- Tenderers shall provide a quotation including the types of experts, the detailed number of expert days for analytical tasks for each subtask of task 1 (4.2.1.1, 4.2.1.2, 4.2.1.3)
- Lot 2 task 4.2.2.3 a. assuming 5 case studies for an analytical paper.
- Lot 2 task 4.2.2.3 b

Task/N° of days	Total N° of person/days per level qualification I	Total N° of person/days per level qualification II	Total N° of person/days per level qualification III	Total N° of person/days per level qualification IV
Lot 2 Task 1				
Lot 2: 4.2.1.1				
Lot 2: 4.2.1.2				
Lot 2: 4.2.1.3				
Lot 2: Task 2				
Lot 2: task 4.2.2.3				
Lot 2: Task 3				
...				
Total				

### Core team of experts

In order to carry out the tasks under Lot 2, the Contractor should propose a project manager and a core team of two persons with the relevant expertise, responsible for the day-today management of the Contract (see 11.2 of the tender specifications). In addition, the core team should be able to rely on the services of an experienced web editor.

### Set up and coordinate of a multidisciplinary additional pool of experts

The contractor will present as part of the tender for Lot 2 a multidisciplinary pool of mutual learning experts, PES experts and PES researchers, labour market experts and researchers. The proposed pool of experts and researchers should prove convincingly expertise in:

- a) Development of methodology for mutual learning at national or EU level
- b) Performance management in public organisations, particularly in PES

- c) Strategic management in public organisations, particularly PES
- d) Management of private employment services
- e) Organisational change in the public sector
- f) Labour market analysis
- g) Evaluation and assessment of active and passive labour market policies
- h) Evaluation and assessment of skills policies and measures
- i) Research on effectiveness, performance, institutional structures of public or private employment services

In addition, the **pre-selected pool of PES experts should be** composed in such a way that it has a capacity to cover a wide array of European languages and that it can provide an expertise of PES functioning and of labour market measures and practices in at least 10 Member States.

#### **4.3. Meetings (applicable to Lot 1 and Lot 2)**

The Contractor(s) for Lot 1 and Lot 2 are expected to participate in co-ordination meetings twice a year at DG EMPL premises in Brussels. The Contractor(s) should propose an agenda at least five days before the meeting and make the minutes of the meeting within a week after the meeting.

The contractor of Lot 1 shall organise two meetings per year of the PES Benchlearning Steering Group – composed of 4 PES – either in Brussels, and cover their travel costs or per videoconference and apply the provisions described under Lot 1. The contractor of Lot 2 may be invited to attend these meetings as well.

The Contractor(s) must prepare the minutes of any meetings attended. All meetings will take place in Brussels. The entire Contractor's costs and expenses related to the participation in these meetings must be included in the fixed price.

The Contractors may be asked to attend additional meetings at the invitation of the Commission. In this case, any mission expenses incurred by the Contractors will be covered separately by the Commission.

#### **4.4. Quality control and assurance (applicable to Lot 1 and Lot 2)**

The contractor is responsible for ensuring the quality of all works carried out in accordance with the requirements described in this call for tenders. After approval by the Commission all deliverables documents should be made available electronically.

Tenderers must include a proposal for a quality plan in their bids. This proposed quality plan must specify how the tenderer intends to control and ensure high quality and effective monitoring of the services, works and products – including first draft texts - they may be required to supply to the Commission throughout the period of performance of the Contract. In particular, the quality plan should describe:

- the various procedures that the tenderer intends to implement and the indicators to be used to ensure the quality and monitoring of the services and products rendered;
- the personnel policy, management and training including the mechanisms for notification to the Commission, and timely and full replacement of any reduction in capacity in order to ensure the committed level of expertise and resources throughout the whole duration of the Contract;
- the procedures the tenderer intends to use to gather and process indicators of performance and client satisfaction and any complaints received;

- the quality control and assurance/complaint management;
- the procedure for updating and adapting changes to the quality plan, taking account of the fact that any such updating and adaptation must have the Commission's prior approval.

All expenses incurred in producing and implementing the quality plan will be borne by the Contractor. Quality control is mandatory and must be performed at each step of the production process. For each aspect of a deliverable, the work must have been thoroughly revised and reviewed by the Contractor, so as to be usable as it stands, without further amendment by the Commission.

#### **4.5. Content delivery (applicable to Lot 1 and Lot 2)**

All texts mentioned above should be edited and delivered in English and in a way well adapted to the target groups and the fact that they are mainly intended to be published on the web. They must be written by or revised by native English speakers with relevant journalistic background and comply with the editorial style guide.

The place of delivery is Brussels, Belgium or – if explicitly stated in the annual work programme – any other place in the EU/EEA.

## **5. Time schedule and reporting**

The service contract is concluded for a period of 12 months with effect from the date of signature. This contractual period and all other periods specified in the service contract are calculated in calendar days unless otherwise indicated.

The service contract may be renewed up to 3 times for a period of 12 months. The period of performance of the possible renewals will not exceed 12 calendar months. Renewal does not imply modification or deferment of existing obligations.

The contracting authority may use Article 104 of 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<sup>18</sup> and article 134 1. (f) and 3. of the Rules of Application (RAP), N° 1268/2012 Commission Delegated Regulation of 29 October 2012<sup>19</sup>.

### **5.1. Time schedule**

The following is an indicative and preliminary timetable for execution of this contract. The dates refer to months starting from the signature of contract, and may need to be adjusted.

<sup>18</sup> Official Journal L298 of 26/10/2012 2

<sup>19</sup> Official Journal L362 of 31/12/2012

Actions/Deliverables	Months
Signature of the contract	0
Kick-off meeting	1
Inception report including Project Quality Plan (PQP)	2
Inception meeting	2
Interim report	7
Interim report meeting / request for interim payment	7
Draft final report	11
Meeting on the draft final report	11
Final report /request for balance payment	12

## 5.2. Reporting

All reports will be regarded as draft until been approved by the Commission. All reports and deliverables specified under in chapter 4 of the tender specifications will be written in English unless specified otherwise.

The **inception report** sets out in detail the finalised methodology for the study (subject to approval by the European Commission). It will include, in particular:

- a) definitions of key terms and concepts where relevant;
- b) the updated analytical and methodological framework. This should include updated proposals for the key issues listed in paragraph 12 ('Award criteria'), which will also be the focus on the kick-off meeting;
- c) project organisation, roles and responsibilities (internal to contractor and with DG EMPL and other stakeholders)
- d) a detailed time schedule and work plan for the remainder of the work.
- e) description of procedures and used tools
- f) reporting to DG EMPL
- g) plan for quality management and quality assurance for deliverables and provided services
- h) acceptance procedures for deliverables and provided services

The Contractor will have to present to the Commission a six-month interim report with indication of the assignments implemented and planned, the results obtained, the resources allocated and used and any problems encountered. The acceptance of the interim report is the pre-condition for the release of the interim payment that can amount up to 50% of the amount indicated in Article I.3.1. of the service contract.

A draft final report is due after 11 months and will be discussed in a separate meeting. The final report will be delivered in English both in accessible electronic (Word and PDF) and

paper form (3 copies). The final report shall describe the work done during the year with view to the tasks set out in chapter 4, drawing conclusions and giving recommendations, if appropriate. The final report shall provide a comprehensive overview of the results obtained and the resources allocated.

The executive summary and the key points will be provided in English, French and German. Each of the reports has to be approved by the European Commission. The Commission has the right to request additional information or redrafting of the reports

## 6. Price

### 6.1. Protocol and taxes applicable

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

### 6.2 Details for prices

The maximum amount of the contract for lot 1 is € 1.700 000 and for Lot 2 also 1.700 000.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

- Professional fees and other costs expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover the experts' fees and administrative expenditure. The contractor's costs for participation in meetings must be included in fees.
- Other costs: any expenditure other than professional fees linked to the implementation of the different tasks of this contract such as travel and accommodation expenses of PES network participants and contractors staff related to the activities organised under this contract, expenses for the organisation of events, conferences, seminars, equipment, translation, interpretation, etc., shipment of equipment or unaccompanied luggage, directly connected with performance of the tasks of this contract.

A more detailed planning of the implementation of the tasks will be defined in an annual work programme, to be defined by Commission after consultation of the PES network

The services under the Service Contract are to be provided under the supervision of the Commission. The language for communication with the Contractor(s) will be English. The selected Contractor(s) will work closely with the Commission so that the latter is able to guide and monitor the implementation of tasks within the specified timeframe.



### 6.3. Presentation of financial offer

It is recommended that the detailed financial offer follows this model:

Description	Unit price in EUR	N° of units for experts in terms of Person/day	Unit type for experts in terms of level of qualification	Subtotal per item in EUR	Total amounts in EUR
<b>Experts' fees</b>					
<b>Details</b>	0.00	0	w.d.	0.00	0.00
<b>Other costs</b>					
<b>Details</b>	0.00	0	Unit	0.00	0.00
<b>Total amount</b>					<b>0.00</b>

## 7. Payments and contract

In drawing up the bid, the tenderer should take into account the provisions of the standard service contract comprising the "General terms and conditions applicable to service service contracts". See Article 1.4. of the draft contract.

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## **Administrative part**

### **8. Participation**

#### **8.1 Participation to the procedure**

Participation in this tender procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement. Where the Multilateral Agreement on Government Procurement<sup>20</sup> concluded within the WTO applies, the participation to the call for tender is also open to nationals of the countries that have ratified this Agreement, on the conditions it lays down.

#### **8.2 Contractual conditions**

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

#### **8.3 Sub-contracting**

Subcontracting is permitted in the tender but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers must give an indication of the proportion of the contract that they intend to subcontract.

Tenderers are required to identify all subcontractors whose share of the contract is above 10% of the bid.

During contract execution, the change of any subcontractor identified in the tender will be subject to prior written approval of the Contracting Authority.

### **9. Joint tenders**

A joint tender is a situation where a tender is submitted by a group of economic operators (consortium). Joint tenders may include subcontractors in addition to the joint tenderers. In case of joint tender, all economic operators in a joint tender assume joint and several liability

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<sup>20</sup> See [http://www.wto.org/english/tratop\\_E/gproc\\_e/gp\\_gpa\\_e.htm](http://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm)

towards the Contracting Authority for the performance of the contract as a whole<sup>21</sup>. Nevertheless, tenderers must designate a single point of contact for the Contracting Authority.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the member duly authorised by the other members via a power of attorney.

The documents required and listed in the following points (10 and 11) must be supplied by every member of the grouping.

## 10. Exclusion criteria and supporting documents

- 1) All tenderers shall provide a declaration on their honour (see Annex 5 of the invitation to tender), duly signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in **Articles 106 and 107 (1) of Financial Regulation**.

The declaration on honour is also required for identified subcontractors whose intended share of the contract is above 10%.

- 2) The successful tenderer shall provide the documents mentioned as supporting evidence in Annex 5 of the invitation to tender before signature of the contract and within a deadline given by the contracting authority. This requirement applies to all members of the consortium in case of joint tender and to identified subcontractors whose intended share of the contract is above 10%.

### **Article 143 of the Rules of Application – Evidence**

3. *The contracting authority shall accept as satisfactory evidence that the candidate or tenderer to whom the contract is to be awarded is not in one of the situations described in points (a), (b) or (e) of Article 106(1) of the Financial Regulation, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (a) or (d) of Article 106(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.*

*Where the document or certificate referred to in paragraph 1 of this Article is not issued in the country concerned and for the other cases of exclusion referred to in Article 106 of the Financial Regulation, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.*

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<sup>21</sup> These entities can take the form of an entity with or without legal personality but offering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association). The contract has to be signed by all members of the group, or by one of the members, which has been duly authorised by the other members of the grouping (a power of attorney or sufficient authorisation is to be attached to the contract), when the tenderers have not formed a legal entity.

4. *Depending on the national legislation of the country in which the candidate or tenderer is established, the documents referred to in paragraphs 1 and 3 shall relate to legal persons and/or natural persons including, where considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or tenderer”.*

**See Annex 5 of the invitation to tender (which may be used as a checklist) for the supporting documents accepted by the European Commission to be provided by applicants, tenderers or tenderers to who the contract will be awarded.**

- 3) The contracting authority may waive the obligation of a candidate or tenderer to submit the documentary evidence referred to in Article 143 of the Rules of Application, if such evidence has already been submitted to it for the purposes of another procurement procedure launched by DG EMPL and provided that the issuing date of the documents does not exceed one year and that they are still valid.

In such a case, the candidate or tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

## **11. Selection criteria**

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this call for tender.

The evidence requested should be provided by each member of the group in case of joint tender and identified subcontractor whose intended share of the contract is above 10%. However a consolidated assessment will be made to verify compliance with the minimum capacity levels.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

### ***11.1 Economic and financial capacity and evidence***

- Appropriate statements from banks
- Presentation of balance sheets
- Copy of the profit & loss account and balance sheet for the last two years for which accounts have been closed
- Appropriate certificate demonstrating an annual turnover of more € 1 000 000 per year.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, he or she may prove his or her economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification in the tender. The Commission reserves the right to

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

## 11.2 *Technical and professional capacity criteria and evidence*

### a. **Criteria relating to tenderers**

Tenderers (in case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The tenderer for Lot 1 must prove experience in the fields of PES performance analysis and assessment, and employment analysis with at least one project delivered in this field in the last three years with a minimum value for the project of € 200 000.
- The tenderer for Lot 1 must prove experience in survey techniques, data collection, statistical analyses and drafting reports and recommendations
- The tenderer for Lot 2 must prove experience in the field of mutual learning with at least one project delivered in this field in the last three years with a minimum value for the project of € 200 000.
- The tenderers for Lot 1 and Lot 2 must prove experience of working in 5 languages with at least 3 projects delivered in the last three years showing the necessary language coverage.
- The tenderers for Lot 1 and Lot 2 must prove capacity to draft reports in English.

### b. **Criteria relating to the team delivering the service**

In order to carry out the task under Lot 1/Lot 2, the Contractor(s) should propose a **project manager and a core team** of at least two persons composed in such a way that it covers all the necessary expertise for the day-to-day management of the Contract:

- Project Managers for Lot 1 and Lot 2: At least 15 years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size (at least € 1.000 000), with experience in management of teams of at least 5 people.
- The project managers for Lot 1 and Lot 2 should have relevant experience in the work of employment services, PES performance management or PES mutual learning, guaranteed by three assignments for projects in at least one of the above indicated areas.
- Language quality check for Lot 1 and Lot 2: at least 1 member of the team should have native-level language skills in English other language or equivalent, as guaranteed by a certificate or past relevant experience.
- The tenderer's core team for Lot 1 must be composed of experienced experts and/or researchers (level I or II) in the EU Member States and/or EEA countries, specialised in employment services in particular PES performance management, PES administrative data analysis and PES strategic management, and labour markets experts and researchers, etc. with extensive experience in analysing respective quantitative and qualitative data. The experts theoretical and empirical knowledge should be attested by the CVs and related documentation. Professional experience with regards to working for a PES, preferably field experience in a PES, experience in the management of a PES, experience in European cooperation between PES and measurement of PES performance are particularly important.

- The tenderer should present a list of experts to be used for the service contract, together with their CVs and qualifications and professional capacities, including experts belonging to pool of experts (even if working on occasional basis).
- The tenderer's core team for Lot 2 must include a senior expert in employment services, PES performance management, PES strategic management (level I or II) and expert in mutual learning at EU level (level I or II) with relevant higher education degree and 10 years' professional experience in the field. Professional experience with regards to working for a PES, preferably field experience in a PES, experience in the management of a PES, experience in European cooperation between PES and measurement of PES performance are particularly important. In addition, the core team should be able to rely on the services of an experienced web editor. The experts theoretical and empirical knowledge should be attested by the CVs and related documentation.
- The tenderers for Lot 1 and Lot 2 are required to set up a multidisciplinary additional pool of experts and PES researchers, labour market experts, etc. with the qualifications as outlined in chapter 4 of the tender specifications; not more than 20 experts should be proposed per lot. The experts theoretical and empirical knowledge should be attested by the CVs and related documentation

**c. Evidence**

The following evidence should be provided to fulfil the above criteria:

- List of relevant services provided in the past three years, with sums, dates and recipients, public or private. The most important services shall be accompanied by certificates of satisfactory execution, specifying that they have been carried out in a professional manner and have been fully completed;
- The educational and professional qualifications of the persons who will provide the service for this tender (CVs) including the management staff. Each CV provided should indicate the intended function in the delivery of the service. The experts theoretical and empirical knowledge should be attested by the CVs and related documentation.

## 12. Award criteria

The tender will be awarded according to the best-value-for-money procedure. The quality of the tender will be evaluated based on the following criteria. The maximum total quality score is 100 points.

### Award criteria for Lot 1:

1. Demonstration of the tenderer's understanding of the policy context of the assignment and the results to be achieved, 10/100  
The degree of understanding of the nature of the assignment, its context and results to be achieved.
2. Quality of the proposed work plan and methodology, 40/100
  - a) Appropriateness, feasibility and robustness of the methodology proposed among others the methodology on analysing/combining the different quantitative and qualitative benchmarking elements
  - b) Overall quality, coherence and soundness of the work plan
3. Quality of the proposed team in terms of composition, management and appropriateness of task distribution, 30/100
  - a) Sufficiency and adequateness of resources and their allocation - broken down by category of experts - for the different tasks to be performed
  - b) Ability to complete the work well within the time available
4. Clarity and overall coherence of the proposal, 20/100

### Award criteria for Lot 2:

1. Demonstration of the tenderer's understanding of the policy context of the assignment and the results to be achieved, 10/100  
The degree of understanding of the nature of the assignment, its context and results to be achieved.
2. Quality of the proposed work plan and methodology, 40/100
  - a) Appropriateness, feasibility and robustness of the learning methodology proposed among other the methodology for integrating and best exploiting a series of learning tools on a given theme
  - b) Overall quality, coherence and soundness of the work plan
3. Quality of the proposed team in terms of composition, management and appropriateness of task distribution, 30/100
  - a) Structure of the team and allocation of the human resources to tasks
  - b) Ability to complete the work well within the time available
4. Clarity and overall coherence of the proposal, 20/100

Tenders must score minimum 50% for each criterion and sub-criterion, and minimum 70% in total. Tenders that do not reach the minimum quality thresholds will be rejected and will not be ranked.

After evaluation of the tender, the tenders are ranked using the formula below to determine the tender offering the best value for money.

The total points will be divided by the price, with the highest scoring bid being chosen

## 13. Content and presentation of offers

### 13.1 Content of bids

Tenders must include:

- A cover letter presenting the name of the tenderer (including all entities in case of joint offer) and identified subcontractors if applicable, and the name of the single contact person in relation to this tender;
- The name and function of the contractor's legal representative (i.e. the person authorised to act on behalf of the contractor in any legal dealings with third parties);
- In case of joint tender, the cover letter must be signed by a duly authorised representative for each tenderer, or by a single tenderer duly authorised by other tenderers (with power of attorney).
- If applicable, the cover letter must indicate the proportion of the contract to be subcontracted.
- Subcontractors must provide a letter of intent stating their willingness to provide the service foreseen in the offer and in line with the present tender specification.
- Proof of eligibility: tenderers must indicate the State in which they have their registered office or are established, providing the necessary supporting documents in accordance with their national law;
- The tenderer (or the single point of contact in case of joint tender) must provide a Financial Identification Form and supporting documents. Only one form per offer should be submitted (no form is needed for subcontractors and other joint tenderers). The form is available on:  
[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/index\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm) .
- In order to prove their legal capacity and their status, all tenderers must provide a signed Legal Entity Form with its supporting evidence. The form is available on:  
[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)  
Tenderers that are already registered in the Contracting Authority's accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.  
Tenderers must provide the following information if it has not been included with the Legal Entity Form:
- For legal persons, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.



- For natural persons, where applicable, a proof of registration on a professional or trade register or any other official document showing the registration number.
- A technical and financial offer:
- All information and useful documents in view to give to the Commission the opportunity to assess the offer on the basis of selection and award criteria (see points above);
- Price;
- List of experts assigned, their CVs, classified by level of expertise according following criteria:

Level of qualification I
<p>Highly qualified expert having assumed important responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise.</p> <p>He/she must have at least 15 years professional experience of which at least 7 must be connected with the professional sector concerned and the type of tasks to be performed.</p>
Level of qualification II
<p>Highly qualified expert having assumed responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise.</p> <p>He/she must have at least 10 years professional experience of which at least 4 must be connected with the professional sector concerned and the type of tasks to be performed.</p>
Level of qualification III
<p>Certified expert having received a high-level training in his/her profession recruited for his/her thought and creativity skills as regards professional practise.</p> <p>He/she must have at least 5 years professional experience of which at least 2 must be connected with the professional sector concerned and the type of tasks to be performed</p>
Level of qualification IV
<p>Junior expert, newcomer to the profession but holding a university degree or equivalent training related to the professional sector concerned and the type of tasks to be performed.</p>

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### **13.2. Presentation of bids**

They must include all requested information (see tender specifications and draft contract).

They must be clear and concise.

They must be signed by signed by the legal representative of the tenderer.

They must be submitted in accordance with the specific requirements of the invitation to tender letter, within the deadline laid down.