

FINANCE AND PROCUREMENT

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Thessaloniki, 14 April 2015

OPEN INVITATION TO TENDER

Learning cultures in organizations
AO/DSL/ABARA/GRUSSO/learning cultures in organizations/002/15

REFERENCE: *Contract notice 2015/S 071-125430 of 11/04/15*

Tender Specifications

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

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

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

or

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

or

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

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

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

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

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

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

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

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

<p>OPEN INVITATION TO TENDER</p> <p>CEDEFOP No: AO/DSL/ABARA/learning cultures in organizations/02/15 <i>‘Learning cultures in organizations’</i></p> <p>Name of tenderer:</p> <p>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>
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The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in section 6 of the attached Tender Specifications.

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

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

7.1 Contacts before the final date for submission of tenders:

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

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

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

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

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

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

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	20/05/2015	17.00h
Last date on which clarifications are issued by Cedefop	< as soon as possible >	N/A
Deadline for submission of tenders (hand delivered)	28/05/2015	17.00h
Deadline for submission of tenders by post / courier	28/05/2015	N/A
Validity of the tenders	28/11/2015	N/A
Tender opening session	11/06/2015	11.00h
Estimated contract signature date	Beginning of September 2015	

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of an Order Form under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

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

16. Once Cedefop has opened the tender, the document shall become the property of Cedefop and it shall be treated confidentially.
17. You will be informed of the outcome of this procurement procedure by e-mail. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check it regularly.

Yours sincerely,

G. Paraskevidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DSL/ABARA/learning cultures in organizations/002/15

'Learning Cultures in Organizations'

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

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

To provide people with the skills they need, vocational education and training systems (VET) need to adapt quickly to changing demands. European VET policy's central aim is to promote excellence through VET. To make it both an attractive learning option for the brightest and best young people and adults and an effective way of helping those with low levels of qualification to develop their skills.

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽¹⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

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

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

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

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

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

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

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

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and job requirements.

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

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year.

In addition to its web portal www.cedefop.europa.eu, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and Twitter at www.twitter.com/cedefop.

1. OVERVIEW OF THIS TENDER PROCEDURE

In submitting his tender in response to this tender procedure, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale and terms of business may be, which he hereby waives. No account can be taken of any reservation or disclaimer expressed in the tender as regards the tender dossier's Tender Conditions and Specifications and the Contract's Special and General Conditions. If necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender. Any reservation or disclaimer may result in the rejection of the tender without further evaluation on the grounds that it does not comply with the conditions of the Tender Dossier.

Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a Technical and Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

- a) Title of the contract: Learning cultures in organizations
- b) Short description of content of this contract:
The ultimate aim of this contract is to identify cultural patterns (values, beliefs and attitudes) within enterprises and across sectors in respect to the support of learning. By means of extensive case studies, a holistic overview about practices that support workplace learning within successful enterprises in selected sectors will be developed and analysed. It will be further inquired in what ways workplace learning supports business success. The information derived from the study will be processed and made available to different target groups (e.g. HR managers, entrepreneurs, employees' representatives, VET institutions, researchers).
- c) Type of contract: Framework Service
- d) Framework Service Contract whereby the services will be provided following the signature of Order forms.

1.2. Place of delivery or performance

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

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers may **not** offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of 400,000 EUR (**without VAT**) over a two-year period.

The two following assignments are foreseen under this framework contract, each one corresponding to a separate order form:

Assignment 1 – estimated amount of EUR 200.000

Assignment 2 – estimated amount of EUR 200.000.

Tenderers should be aware that the information on volume is purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms that will be issued after the Framework Contract is signed may not reach the a.m. estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Orders Forms.

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party and shall have a total duration of 24 months. It is foreseen to sign the second order form before the expiry of the first order form, due to concurrent tasks.

1.7. Main terms of financing and payment

Payments will be made within 30/60 days of submission of invoices and at the conditions set out in the draft contract.

2. TERMS OF REFERENCE

2.1 BACKGROUND INFORMATION

2.1.1 Current state of affairs

In the current economic climate, governments of EU member states are faced with the challenge of alleviating the financial burden of the economic downturn and seek resourceful solutions to prepare the workforce for the labour markets of the future. Enterprises' engagement in the development of their staff is therefore of vital importance. The Bruges Communiqué² stresses the increased relevance of training provision for employers and employees and the establishment of framework conditions aimed at encouraging companies to continue to invest in human resources development and in continuing VET (balanced mix of incentives, rights and obligations). Flexible training arrangements and easy access to education and training at different life stages are encouraged as well as the close co-operation between enterprises and training institutions. The European Agenda also supports awareness building among employers about the benefits of adult learning for productivity, competitiveness, creativity, innovation and entrepreneurship. To close the gap between Europe and the world's innovation leaders, the USA and Japan, the EU has implemented an overarching innovation strategy, including the EU flagship initiative 'innovation union' as part of the Europe 2020 strategy³. The Bruges Communiqué has identified work-based learning and innovation among the areas that require increased political attention and strategic action.

Enterprises are constantly challenged to succeed in the market competition. Therefore, they need to be innovative and quickly adapt to market changes. This requires constant learning within the organization. That enterprises need to invest in the training of their workers is uncontested knowledge: learning is one of the pillars that underpin economic success. However, a strategic approach to human resource development is needed in order to stay competitive. Training is acknowledged as profitable for the enterprise and for the employees. Still, employees' access to training to further develop their job-related skills is sub-optimal in some EU countries. How learning processes are facilitated and enhanced differs between enterprises, industries, sectors, regions and countries. Learning itself takes place in many different ways: non-formal, informal and formal. It is a constant process taking place at work and within VET and adult training institutions. The results are not always measured nor regularly assessed.

The CVTS survey⁽⁴⁾ results provide a general indication of workers' engagement in adult learning across EU countries. A qualitative inquiry into the learning culture within enterprises would extend this perspective by providing knowledge about attitudes, values and practices within an organization that support and encourage a continuing process of learning benefiting both the organization and the individual worker. "Learning processes involve the generation, collection, interpretation, and dissemination of information. They also include experimentation to develop and test new products and services"⁽⁵⁾. Therefore, this study intends to contribute to a more profound understanding of learning cultures in enterprises across individual employers in selected sectors, industrial clusters and European countries. Through the creation of a repertory of practices enterprises and VET institutions would be provided with detailed information meant to inspire

² http://ec.europa.eu/education/policy/vocational-policy/doc/brugescom_en.pdf.

³ http://ec.europa.eu/research/innovation-union/index_en.cfm?pg=intro.

⁴ Eurostat (2010). Continuing vocational training survey (CVTS), http://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Continuing_vocational_training_survey_%28CVTS%29&oldid=18266.

⁵ Melhem, Y. (2011). Learning organization building blocks: The case of IRBID district electricity company (IDECO) in Jordan. *International Journal of Business and Public Administration*, 8(2), 36-49, p. 38.

enterprises about potential for further development. Based on the understanding that firms that form highly efficient and flexible European innovation systems create positive horizontal and vertical spill overs and linkages to other sectors / enterprises / suppliers, the knowledge derived from in-depth case studies would be relevant for many employers. It can be assumed that enterprises that have been successful ⁽⁶⁾ at the market for about 30 years have managed to overcome many external and internal crises in order to stay competitive. This, in many cases, reflects upon their learning cultures including their internal commitment to learning. It may also reveal a particular policy or institutional context that is conducive to learning and reflects upon a specific culture in a sector or country.

2.1.2 Theoretical framework and literature review

Learning, in an organisational context, reflects the way an enterprise can accommodate change and new knowledge by successfully making it compatible with its internal culture and strategic approach. The two most important contributions to understand the dynamics of learning according to enterprise culture come from research on the social organisation of enterprises and from economic research on systemic dynamics of innovation.

The social study of enterprises departs from empirical research to characterise relations between groups of professionals in the firm, processes of internal decision, definition of authority, the role of qualifications as well as training and acquisition of knowledge. These studies identify enterprise cultures and depict their characteristics, according to sector of activity. They create useful insights over how stability, incremental change and complete transformation of the activities are achieved more or less successfully in each culture.

The study of organisational cultures sets at the centre of its analysis the process of local construction of meaning ⁽⁷⁾. Widely departing from Lewin's ⁽⁸⁾ notions of personal and group field, organisational culture is generally understood as a sets of norms, values, artefacts, myths and conventions ^{(9),(10),(11)} which form a more or less stable nucleus of principles, which regulate action and mediate learning. Classic studies of organisations by Robert Merton ⁽¹²⁾ and Michel Crozier ⁽¹³⁾, provided initial insight by analysing strategic interaction and authority in organisations. These theories tend to have a strong attachment to specific forms of organisations and functions performed. Recent theories tend to frame action in organisations as influenced by the identity of individuals and professional groups, which carry weight over the negotiation of interests, and therefore decisions and learning ^{(14),(15)}.

One important aspect of this set of theories is the discussion of resistance to change in organisations. Change may be perceived by participants as harmful and therefore learning activities may find themselves condemned before they even begin. Research on the unconscious factors in organisational resistance to change has reinforced the idea that admission of new knowledge in groups is influenced by a set of established local rules which may not always

⁶ Indicators for economic success are for example profits, productivity, market share, shareholder value or relative position to competitors. Sectors have been chosen based on Eurostat (2013). European business. Facts and figures. http://ec.europa.eu/eurostat/statistics-explained/index.php/European_business_-_facts_and_figures.

⁷ Ashforth, B. (1985). Climate formation: Issues and Extensions. *Academy of Management Review*, 10(4), 837-847.

⁸ Lewin, Kurt (1951) *Field Theory in Social Science*. New York: Harper and Row.

⁹ Schein, E. H. (1990). Organisational culture. *American Psychologist*, 45(2), 109-119.

¹⁰ Dodier, N. (1993). Les appuis conventionnels de l'action. *Éléments de pragmatique sociologique*, Réseaux, 62, CNET.

¹¹ Alter, N. (2005). *L'innovation ordinaire*. Paris : PUF.

¹² Merton, R. (1968). *Social Theory and Social Structure*. New York: The Free Press.

¹³ Crozier, M. (1963). *Le Phénomène bureaucratique*. Paris: Du Seuil.

¹⁴ e.g. Sainsalieu, R. (1987). *Sociologie de l'organisation et de l'entreprise*. Paris: Fondation nationale des sciences politiques.

¹⁵ Sainsalieu, R. (1991). *L'entreprise, une affaire de société*. Paris: Fondation nationale des sciences politiques.

appear rational to a casual observer (¹⁶),(¹⁷). Any intervention to stimulate learning is, accordingly, destined to fail unless it can produce insight on the mechanisms of resistance and admission of knowledge.

For example, introduction of job rotation or the enlargement of job post responsibilities can cause negative reactions from workers, who may perceive these changes as disruptive and menacing to their stability. Reasons for resistance to change include factors such as fear of loss of acquired rights, lack of information, unclear rationale for change, inadequate expectations concerning new work contents, weak decision making skills and suspicion towards leaders (¹⁸). Factors researched in literature as reducing the resistance to change and facilitating learning processes in organisations include participation of workers in decision processes (especially in Taylorist-type environments) and effective internal communication (¹⁹). Important activities frequently associated with increased motivation of workers in processes of change include personal guidance (to understand motivations of workers and groups of workers), facilitation of non-structured learning, training well supported by assessment, process consulting, internal surveying and empowering feedback mechanisms (²⁰).

The more recent wave of research on organisational culture acknowledges resistance to change and its regulatory role, which are both essential to environmental stability. Inertia in organisations can serve a positive, regulatory role in the admission of new knowledge, while at the same time can generate systemic failure (usually in large corporations) due to an inadequate low pace of innovation. Inertia thus serves the purpose of sustaining an enterprise culture and the identity of workers, during periods of change, but can also represent a business liability. Any training or other learning activities must necessarily account for the established sense, purpose and shared strategy which dominate the enterprise (²¹), which frequently varies across sectors.

Among the most important European research developed to understand the cultures of organisations are, arguably, the studies developed by the French Laboratory for Economic Sociology (LISE). The first batch of studies occurred in the mid 1990's and included 81 French enterprises, from all sectors of activity, in which a total of over 4000 interviews were developed (²²).

This first study identified five fundamental enterprise "social worlds":

1. the dual enterprise – Taylorist organisation, strong specialisation and division of labour – including not only manufacturing industry, but also food processing, call centre activities or industrial cleaning;
2. the bureaucratic enterprise – strongly hierarchical, highly formalised and decentralised – comprising fundamentally public sector activities;
3. the communitarian enterprise – based on complex activities, strong know-how, strongly negotiated solutions and high levels of innovation – can be found in all sectors, normally in specialised niches;
4. the modernised enterprise – based on complex products, but highly formalised, with structured human resource management, with worker consultation/participation – although they may be found in other sectors, these enterprises are commonly identified in highly capitalised activities with specialised, highly qualified labour, such as telecommunications, electrical industry, oil and chemical products;

¹⁶ Bion, W. R. (1961). *Experiences in Groups*. Tavistock.

¹⁷ Bion, W. (1984). *Learning from experience*. London, UK: Karnac Books Ltd.

¹⁸ Leigh, Andrew (1997). *Effective change*. London: Institute of Personnel Management.

¹⁹ Lawler, E. (1986). *High-involvement management*. San Francisco, CA: Jossey-Bass.

²⁰ Huse, E. (1980). *Organisation development and change*, SP, MI: West Publishing Co.

²¹ Osty, F., Sainsalieu, R., Uhalde, M. (2007). *Les Mondes Sociaux de L'Entreprise. Penser le développement des organisations*. Édition revue et actualisée, Éditions la découverte, Paris.

²² Osty, F., Sainsalieu, R., Uhalde, M. (1995). *Les Mondes Sociaux de L'Entreprise*. Éditions la découverte, Paris.

5. the enterprise in crisis – similar to the modernised enterprise, but ineffective in establishing negotiated situations with low coherence in its modernisation process. Generally this firm tends to create two separated internal cultures: the old and the new.

This study was re-edited in 2007 ⁽²³⁾, with 45 new cases, which validate this typology. This approach fundamentally pinpoints criteria for intervention in distinct types of enterprise, analysing how to enable enterprises to maintain their strategies, enable incremental/progressive change or achieve processes of radical innovation. For example, it points out how in modernised sectors, such as the electric industry, selectively training specific groups of qualified workers without open consultation and consistent updating of other employees' skills can drive to less than optimal outcomes ⁽²⁴⁾.

This line of research produces useful messages for enterprise managers and particularly for human resource managers. It creates practical advice on how to ensure the successful coordination of technical change with the career development of staff. It also produces insight on making sure that the pace and style of the learning activities promoted (e.g. training, mentoring, peer learning) is compatible with the culture of the enterprise.

In spite of the strong insights which this research provides concerning learning processes, it has three fundamental limitations:

- its geographical scope is limited to France, with no comparative perspective with other countries;
- it is not a systematic study on the learning processes of firms, rather focusing on the general rationality of enterprise processes;
- it is mostly based on an analysis of the internal context, with only partial consideration of external stakeholders and forces (including the influence of trade unions);

This Cedefop study proposes to incorporate the strengths of this line of research and to overcome its limitations by:

- introducing a comparative transnational perspective;
- focusing on the internal learning processes of enterprises with a special focus on training, innovation and the career development of staff;
- analysing the influence of context (including institutional constraints, sector structure and value-added system), by considering sectoral, regional and/or national policies that promote learning, the exchange of knowledge with peers, technological institutes or universities, sector organizations, unions and the education and training systems;
- analysing networked solutions for enterprise learning, based on activity clusters, local innovation systems.

One other important strand of research on learning patterns of enterprises are the evolutionary economic theories and, most notably, systemic theories ^{(25),(26),(27),(28),(29),(30),(31),(32)}.

²³ Osty, F., Sainsalieu, R., Uhalde, M. (2007). *Les Mondes Sociaux de L'Entreprise. Penser le développement des organisations*. Édition revue et actualisée, Éditions la découverte, Paris.

²⁴ Osty, F., Sainsalieu, R., Uhalde, M. (2007). *Les Mondes Sociaux de L'Entreprise. Penser le développement des organisations*. Édition revue et actualisée, Éditions la découverte, Paris.

²⁵ Freeman, C. (1974). *The economics of industrial innovation*. London: Penguin Books.

²⁶ Nelson, R.R. & Winter, S.G. (1982). *An evolutionary theory of economic change*. Boston: Belknap.

²⁷ Lundvall, B-Å. (Ed.) (1992). *National Systems of Innovation: Towards a Theory of Innovation and Interactive Learning*, London, UK: Pinter Publishers.

²⁸ Edquist, C., and McKelvey, M. (Eds.). (2000) *Systems of Innovation: Growth, Competitiveness and Employment*, Cheltenham, UK: Edward Elgar Publishing.

²⁹ Bo, C & Stankiewicz, R. (1991). On the nature, function and composition of technological systems, *Journal of Evolutionary Economics*, 1, 93-118.

In this line of research, the level of success of learning processes in an enterprise is partly reflected in the concept of absorptive capacity⁽³³⁾, which translates the ability of firms in successfully integrating new knowledge in their activity. Systemic theories tend to investigate the existence of appropriate contextual conditions for learning, with great emphasis on external factors. The study of networking mechanisms thus becomes a natural building block of these theories.

These theories have a very strong body of empirical work sustaining them, since they were created aiming at providing policy advice. Some of the main studies departed from the work of the Science Policy Research Unit (SPRU) of the University of Sussex. Possibly the most important field research at the foundation of this line of studies is Keith Pavitt's extremely influential analysis of learning processes across sectors⁽³⁴⁾.

Pavitt's study, which departed from the analysis of over 2000 innovation processes in British firms, allowed for the identification of a taxonomy of sectoral learning patterns. To analyse the involved variations in learning processes he analysed the sources of knowledge and technology used by firms, the way they incorporated the needs of clients in their processes and the extent to which knowledge could be appropriated by the firm by applying for patents or restricting access to key information. He also analysed structural factors such as the influence of size and integration between firms.

Pavitt divides industries into (1) supplier dominated – mostly traditional manufacture (e.g. textiles) and agriculture; (2) scale intensive – large producers of bulk materials such as steel and glass and consumer durables, such as the automotive sector; (3) specialised suppliers – generally small enterprises operating in sectors such as machinery production and high-tech; (4) science based, such electronics, electrical industry and chemicals. This study (together with other above mentioned) brought into the analysis of economic growth the idea of diversity of enterprise learning processes, influencing the criteria for intervention in industrial policy.

One recent contribution was made by Castellacci⁽³⁵⁾ on the results from the Fourth Community Innovation Survey (CIS4, 2002-2004) combined with OECD-STAN data on the innovative activities developed by firms in 24 European countries. This study refined the basic taxonomy and enlarged it so as to accommodate infrastructure services such as finance and telecommunications and personal services such as hotels, restaurants. The author manages to identify and characterise distinct types of learning process departing from variables similar to Pavitt's.

This type of research analyses learning processes from the perspective of the external context of enterprises and their interrelatedness with external stakeholders. Its main strength is investigating how push and pull factors for organisational learning are shaped by the environment in which organisations are plunged. It investigates, for example, how the educational and training systems stimulate organisational learning and how established institutional arrangements tend to favour some styles of learning over others, generating unequal access by different types of firms.

Due to its emphasis on the effects of external factors, this type of research tends to produce analysis and advice, which is of particular value for policy design and decision.

Factors researched include:

³⁰ Dosi, G. (1982). Technological paradigms and technological trajectories. *Research Policy*, 11, 147-162.

³¹ Dosi, G., Marengo L., Fagiolo G., (2003). Learning in Evolutionary Environments, LEM Papers Series 2003/20, Laboratory of Economics and Management (LEM), Sant'Anna School of Advanced Studies, Pisa, Italy.

³² David, P, Foray D. (2003). Economic fundamentals of the knowledge society. *Policy futures in education*. Special Issue: *Education and the Knowledge Economy*.

³³ Cohen, W., Levinthal, D. (1990). Absorptive capacity: A new perspective on learning and innovation. *Administrative Science Quarterly*, (35), 1, 128-152. Special Issue: Technology, Organizations, and Innovation.

³⁴ Pavitt, K. (1984). Sectoral patterns of technical change: Towards a taxonomy and a theory. *Research Policy*, 13, 343-373.

³⁵ Castellacci, F. (2007). Technological paradigms, regimes and trajectories: Manufacturing and service industries in a new taxonomy of sectoral patterns of innovation. MPRA Paper No. 26408.

- The exchange of knowledge between individuals, enterprises, as well as between knowledge organisations and enterprises
- The influence of personal ties
- The availability of diversified and flexible financing mechanisms to support training and other types of learning
- Access of enterprises to information and communication channels
- Consistency of diverse support systems to learning, such as education system, training system, guidance services, social security, research, collective bargaining.

One of the important aspects of systemic approaches is the identification of patterns of learning, organised around a local networks of enterprises which can have lower or higher degrees of organisation, formal character and density of ties. These local frameworks create a precise context favourable to certain types of learning and enterprises, frequently connected to a set of linked sectors or a precise niche.

Bo Carlsson's analysis of the Swedish automotive industry ⁽³⁶⁾, or Guerrieri's ⁽³⁷⁾ analysis of Italian and Taiwanese industrial districts are examples of how researching the learning culture of the enterprise is also an investigation of how local learning cultures are formed and which role they play. For example, local cultures may have link regions across borders, sometimes across great lengths, rather than simply linking contiguous national spaces.

In spite of the insights produced, evolutionary and systemic research has a number of limitations:

- The admission of knowledge and its diffusion inside the enterprise are under-researched.
- Policy advice produced tends to stay at a very general sector level with limited insight on how to support the actual learning styles of firms.
- The scope of this research is innovation and emphasises learning during processes of change. Explaining how the inertia of structures and the stability of processes can drive to success is not always accounted for.
- Absorptive capacity is defined as a direct correlate of skills and information in firms (bounded rationality), which tends to rank firms' learning potential according to their technological level. An insight on social conditions for learning is necessary.
- Due to this factor, the analysis of low tech/traditional sectors can be biased/flawed.

This Cedefop study proposes to incorporate the strengths of this line of research and to overcome its limitations by:

- Introducing systematic and comparative research of internal learning processes in enterprises of several sectors and clusters
- Analysing diverse enterprise learning processes by considering not only flexibility and change, but also the role of group resilience to learning and the stability of structures, products and processes
- Researching on the role played by several actors and groups inside of the enterprise to stimulate and regulate learning
- Have a consistent concern for both high tech and low tech sectors when investigating the success of learning processes

³⁶ Carlsson, B.; Jacobsson, S. (1993). Technological Systems and Economic Performance: the Diffusion of Factory Automation in Sweden (77-94). In D. Foray, C. Freeman (Eds), *Technology and the Wealth of Nations*, London and New York: Pinter Publishers.

³⁷ Guerrieri, P.; Iammarino, S. (2001). The Dynamics of Italian industrial districts: Towards a revival of competitiveness (11-34)? In P. Guerrieri, S. Iammarino, C. Pietrobelli (Eds.), *The Global Challenge to Industrial Districts: SMEs in Italy and Taiwan*. Cheltenham, UK: Edward Elgar.

Systemic economic research is complementary to the enterprise social research. It identifies aspects of policy level decision which can be made more effective by their adaptation to aspects researched within the enterprise. This study will be innovative by combining both approaches, advancing the discussion on how policy can create an institutional support and a context favourable to a diversity of learning cultures in diverse sectors and clusters. Finally, while academic research has focused on the ability to innovate the link between learning, innovation and business success has not been firmly established. The project will investigate how learning supports the ability to innovate and leads to competitive advantage and business success.

2.2 OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.2.1 Overall objective and purpose

The overarching objective of this study is to understand how the learning culture in organizations contributes to their economic success (defined both in terms of stability and innovation⁽³⁸⁾). The nature of the learning culture in each enterprise influences all forms of learning (formal with clear objectives, timing and curriculum - such as when companies offer apprenticeships or when they contribute to higher education studies, non-formal and intentional and informal, which is unstructured and non-intentional) as well as approaches towards using information technology or new forms of work organisation (structures and processes).

Through this study, employers and social partners will be provided with insights about the differences in organizations' understanding of learning culture and its practical implications. The cases will provide examples for mutual learning and inspiration for good practice by illustrating in rich descriptions what exactly takes place at the company level, how is it operating and shaping a particular culture in support of innovation. The findings might differ significantly between organizations, sectors, industrial clusters and countries. This should be brought out through an in-depth inquiry. All strategies might equally, under specific circumstances, lead to good outcomes and their value can only be judged through a benchmarking exercise undertaken by enterprises. Therefore, it is expected that the study will provide a range of highly relevant information that should be of interest to a wide audience.

2.2.2 Research questions

The following questions guide the study:

- Which factors contribute to the shape of a learning culture in successful organizations and how do they operate (organizations context, contextual factors e.g. local/national policies, global competition)?
- How is formal, non-formal and informal learning (acquisition of codified/tacit knowledge) facilitated within the enterprise?
- How beneficial are different types of approaches to support learning within the organization?
- How does the organization of training serve the needs of employers and employees? How are these benefits perceived by different groups of employees?

The following list provides an indication of factors to be looked at:

³⁸ Indicators for economic success are for example profits, productivity, market share, shareholder value or relative position to competitors.

Hard factors:

- HR Management strategies to support learning (e.g. career development interviews, performance review systems, competence modelling in order to identify business outcomes and link them with new roles and competencies to achieve them)
- Comprehensive training strategy that includes IVET and CVET (its transparency towards transitions between positions based on the need for further qualification, career advancement plan, participation in learning among different groups within the organization)
- Work organization and how it supports learning: How is work/are work processes structured to enhance learning (e.g. reduced bureaucracy and regular adjustment of job descriptions which encourages cross functional co-operation, team learning, job-shadowing, job rotation, use of IT technology, measures for quality assurance)
- Structure, culture and operating environments, which contribute to the learning culture as it exists now. This includes that an internal learning strategy exists as a clear vision, knowledge creation, transfer and sharing
- Financing arrangements to support learning, acquisition of external funding and use of external infrastructures in support of workers continuing development, cost-benefit calculations, considerations and strategies in regard to investments in learning.

Soft factors:

- Leadership approach(es), including living and supporting an ethos of self-responsibility for learning, encouraging experimentation, reflection, knowledge importation, information sharing, diffusion of knowledge, process orientation and participation of workers in decision-making, systems thinking, and improvement of mental models⁽³⁹⁾
- Establishment of a communicative work environment (consultation of staff, formal and informal structures for exchange, e.g. creating room for the exchange of ideas outside offices, technology applications for exchange of ideas, more communication with clients, support the exchange of ideas and knowledge about work practices between workers)
- Learning climate described based on a cultural template that is designed around a questioning frame of mind, tolerance of experiments and mistakes, the essential need for differences and the idea of continuous improvement (providing psychological safety, where individuals do not fear to express themselves and convey ideas and thoughts in a rather comfortable and understanding environment, support of the learning of others, time for reflection)
- Inter-company learning: the learning ethos is carried through to suppliers, customers and even competitors through, for example, joint training, shared investment and research and development.

2.3 SCOPE OF THE WORK

2.3.1 Specific activities

³⁹ A mental model is an explanation of someone's thought process about how something works in the real world. It is a representation of the surrounding world, the relationships between its various parts and a person's intuitive perception about his or her own acts and their consequences. Mental models can help shape behaviour and set an approach to solving problems. Smith refers to mindsets and argues that the implementation of a learning culture requires that mindsets are prevented from hardening and that changing activities and tools would support a change of habits of thinking and learning (Smith, 1999).

The study focuses on the production of case studies and will consist of two phases conducted under a framework contract. Phases will correspond to two separate order forms.

Phase 1: The first phase covers the identification and in-depth case study of 8 enterprises that have been economically highly successful over the last 30 years, based on the assumption that continuous economic success is also linked to the internal learning culture in support of innovation.

Phase 1 will consist of three work packages.

Phase 2: This phase will consist of the same three work packages as phase 1 (see below). Following the issuing of the first order form, the tasks in the second order form will be carried out in an identical manner. The content of the case studies may be further refined, in close consultation with the contractor, according to indications arising during the implementation of the first order form. With the completion of each order form, a new set of a minimum of 8 case studies will have to be delivered to Cedefop.

Depending on the availability of financial resources, the second assignment is estimated to start at the end of 2015. In this case, most of the data collection for all the case studies in both assignments will take place during 2016.

Work Package 1: Literature review and identification of suitable enterprises

Literature review regarding the importance of learning in enterprises. During this period eight enterprises must be selected, in a number of sectors of interest and ensuring an adequate geographical balance. The following criteria should be applied to select the first eight cases:

Criteria of economic success: e.g. profits, productivity, market share, shareholder value or relative position to competitors leading to stability at the market and innovation.

Enterprise size: In order to gather in-depth information on internal structures in support of learning the focus is on large and medium-sized enterprises.

Sectors of interest: Based on Eurostat's Business Facts and Figures ⁽⁴⁰⁾ the following strategic European sectors, consisting of a number of successful enterprises have been chosen for the following reasons:

- Sectors should represent distinct technological regimes/social enterprise worlds: tayloristic/supplier dominated associated with traditional manufacture, large scale serialised, and high tech and creative. Sectors with fast high technology development require constant learning and adaptation and are therefore of particular interest. Also, the development and work with new materials leads to high learning efforts.
- Industries that require high efforts in environmental protection and energy savings.
- Within each of these the selected sectors should have high added value.
- High percentage of persons employed.

Strategic sectors that must be covered in the study include:

- Fuel processing and chemicals
- Machinery (especially electrical)
- Content Processing/Publishing

⁴⁰ Eurostat (2013). European business. Facts and figures. http://ec.europa.eu/eurostat/statistics-explained/index.php/European_business_-_facts_and_figures.

From the following list the contractor may choose one sector

- Food, Beverages and Tobacco Industry or Textile Industry
- Medical Technology or Telecommunication Technology

During the first phase of the project two cases per sector should be chosen.

Country coverage: In each sector, two enterprises in two different European countries need to be identified. In total, a minimum of four (4) EU countries should be selected and should represent a balanced geographic coverage in Europe. The selection of enterprises within particular countries should follow the criteria of level of specialisation of countries in particular industries.

Other criteria: Since the listed sectors are quite big, subsectors can be selected within them and need to be specified and explained. Ideally the enterprises chosen should be situated in an industrial cluster in which similar enterprises or suppliers work together and/or concurrently. There are a number of predetermined aspects for the inquiry and analysis as indicated within a preliminary list of items under the research questions in section 2.2.2.

Work Package 2: Case study implementation

The study findings are expected to go beyond the general characterization of learning within organizations and will consist of rich description and narratives to provide insights into strategies, processes of work organization as well as workers' experience of a learning culture.

The enterprises selected at the end of WP1 will be the object of the case studies. The case studies will include **interviews** with representatives of employers and employees (including permanent and temporary workers) at all levels, and the HR/Training Department.

In addition (participatory) **observation within the enterprise** will be essential to explore ways of informal learning, leadership approaches, knowledge sharing, participation in decision making among other factors.

Especially the latter method requires a stay of at least 9 days within the enterprise and will lead to more substantial information about the learning culture than most case studies with less intensity have provided in the past.

Work Package 3: Deliverables

Various outputs are expected based on the data collection.

- 1) A comprehensive research report in which practices within enterprises in support of learning are identified, described and analysed. Provision of a distinguished story about each enterprise that illustrates the specific characteristics of the case. The analysis of the material should firstly lead to thick descriptions. **Thick description** refers to the detailed account of field experiences in which the researcher makes explicit the patterns of cultural and social relationships and puts them in context (⁴¹),
- 2) Best practice booklets which present promising practices, instruments and case descriptions as models for other enterprises within the same sector,
- 3) Video snaps,
- 4) Recommendations for the support of learning within enterprises for the following target groups: (a) employer and employer's organizations; (b) unions and employees,
- 5) Complete material / data to be stored at Cedefop for further in-house research, including audio-video material and photographs.

⁴¹ Holloway, I. (1997). *Basic Concepts for Qualitative Research*. London: Blackwell Science.

2.3.2 Methods and tools

The key research methods to be used in the case studies include standardized and non-standardized (narrative) interviews and participatory observation.

The contractor is required to ensure access to enterprises and their staff as well as the possibility for an extended stay within the premises. During this period the team will collect material from interviews (transcripts, notes) and notes from observation and supporting audio and visual material.

It is up to the discretion of the enterprise if the name of the enterprise shall be shown or anonymised. The analysis of the findings should build upon prior research summarized in the literature review (work package 1).

2.4 REPORTS

2.4.1 Reporting requirements

The contractor will be required to submit the following for each phase:

- A) Inception report, 6 weeks after the date of signature of the order form.
 - The inception report should present – after discussion with Cedefop – a refined version of the methodology proposed in the tender, including a draft proposal of research steps to be taken and first results of the literature review. It should also include a pre-selection of enterprises/sectors/countries for validation and discussion with Cedefop.

- B) First interim report, within 4 months of the date of signature of the order form. This interim report should include:
 - Extended literature review and conceptual framework
 - Information on the selection of enterprises and proof of access to enterprises
 - Adjusted methodology/work-plan

- C) Second interim report, within 9 months of the date of signature of the order form. This interim report should include:
 - Findings from at least 2 case studies (including further desk research)
 - Information on work carried out, including problems encountered or risks expected, solutions found or proposed and potential impact on preparation of final report
 - Proposed structure for presenting the final research findings / final report

- D) A draft final report, within 14 months and a final report within 15 months of the date of signature of the order form. The final report will consist of thick descriptions of each case. The annex should include transcripts and summaries of interviews, notes of observations and visual media (photographs and video snap shots). The structure of the final report needs to be decided upon together with Cedefop.

Cedefop will provide comments on the inception, interim and draft final reports. The contractor should address those comments, liaising closely with Cedefop project managers.

The reports must be written in English and submitted in electronic format. The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual.

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

The Contractor shall ensure that the final report(s) as submitted to Cedefop has (have) been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (the Table in point 5.4.1, item 1c).

2.5 MEETING AND TRAVEL EXPENSES

The Contractor will be requested to attend three one-day meetings at Cedefop with the project managers responsible for each phase:

1. a kick-off meeting related to the first phase, a few weeks after the signature of the contract and first order form (estimated beginning of September 2015) to fine-tune the research methodology to be applied, the data sources to be used and the final planning, described in the inception report; the kick-off meeting related to the second phase will be organised following the signature of the second order form;
2. a meeting to discuss the second draft interim report, monitor progress and discuss the interim findings and preliminary key messages of the study;
3. a meeting to discuss the final outcomes and key messages included in the draft final report, and agree on the final version of the study.

All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described in point 2.3, have to be included in the financial offer (see point 5.4).

Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex II of the draft contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

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

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

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

3.2. Selection criteria

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

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

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

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

3.2.1. Economic and Financial capacity

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

Requirements:

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

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

- Signed Statement (Please fill-in and sign your Statement in Questionnaire 2 of Annex G) of the tenderer's turnover for the last three financial years concerning the type of services similar in nature to those making the subject of this call for tenders.

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

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

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

3.2.2. Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract.

They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements for Technical and professional capacity:

- At least 3 contracts performed in the past ten (10) years similar to the size and nature as those required in this call for tenders;
- The Tenderer's **KEY** experts, whose involvement will be instrumental for the implementation of the contract, must have the relevant to the subject of the contract profiles, knowledge and experience for its successful implementation.

Team leader:

- University Degree, e.g. in organizational sociology, organizational psychology, education, human resources, vocational education and training.
- A minimum of five (5) years of professional experience in managing projects at European/international level.
- A minimum of five (5) years of experience in comparative analysis on education and training or organisational studies or human resources at international, including European, level.
- Linguistic ability to communicate and draft in English: Level C1 of the Common European Framework of Reference for Languages.

Senior expert (at least 4 members, one per country)

- University Degree

- A minimum of eight (8) years of professional experience in conducting case studies in enterprises by applying qualitative research methods (e.g. narrative interviews, participatory observation, structured expert interviews)
- A minimum of five (5) years of research experience in total in one or more of the following fields of research: workplace learning, workplace studies, industry/sector studies, economic sociology, HR management, anthropology (each senior expert must have experience in at least one of the above specified fields and the team of senior experts as a whole should cover all specified fields of research)
- Linguistic ability to communicate and draft in English: Level C1 of the Common European Framework of Reference for Languages.

Junior expert (at least 4 members)

- University Degree
- A minimum of three (3) years of experience in applying qualitative research methods
- A minimum of three (3) years of experience in one of the following fields of research: workplace learning, workplace studies, industry/sector studies, economic sociology, HR management, anthropology (each junior expert must have experience in at least one of the above specified fields)
- Linguistic ability to communicate and draft in English: Level B2 of the Common European Framework of Reference for Languages.

Proofs / Evidences of Technical and professional capacity

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

- Brief company profile (**please fill-in Annex G-Questionnaire 4**) with clear reference to its experience and expertise in the field areas of the study;
- List of contracts performed in the past ten (**10**) years describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Annex G-Questionnaire 3**);
- The CVs of ONLY the KEY experts **whose involvement will be crucial for performing the contract.**

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

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tenderer must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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

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

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 35 countries, namely: the 28 EU Member States, 3 EEA Countries (Lichtenstein, Norway, Iceland) and 4 SAA Countries (FYROM, Albania Serbia and Montenegro).

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

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

4.1. Joint Offers/ Groupings (Consortia)

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

- Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.
- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2. Subcontracting/Subcontractors

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

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

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

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

5. AWARD OF THE CONTRACT

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

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

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

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

Whereby:

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

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

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

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

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

5.1. Technical evaluation

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

The evaluation will be carried out on the basis of the following technical award criteria:

- **Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (25 points)**
 - Understanding of the general objective of the assignments, context, nature and results to be achieved (10 points)
 - An in-depth understanding of the concepts and research issues related to the assignments as well as policies (15 points)
- **Award criterion 2 – Relevance and adequacy of the methodology suggested for carrying out the tasks and description of outputs (60 points)**
 - Adequacy of research methods for the data collection processes (quality of the interviews) and ensuring data quality and structure of ‘thick descriptions’ (30 Points)
 - Quality of case studies based on selection criteria, e.g. economic success, geographical representation of countries, indication of learning cultures and on their positioning in industrial clusters (15 points)
 - Description of the approach/method proposed to analyse case study material provided and provide answers to the research questions, and concept for outputs: research report, recommendations, best practice booklets, video snaps (15 points)
- **Award criterion 3 – Appropriateness of the organisation and management arrangements (15 points)**
 - Clarity, coherence and plausibility of the activity/work plan, allocation of tasks among the proposed research team members; capacity to perform the tasks as defined in the terms of reference within the given deadlines (10 points)
 - Risk assessment of likely difficulties in carrying out the work, and proposed actions (5 points).

In order to guarantee a minimum threshold of quality, offers that do not reach a minimum of 50% of the possible score for each award criterion, will be eliminated from further evaluation. Tenders scoring less than 65 (of a maximum of 100) points against the award (technical) criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2. Technical proposal

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

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria. It is up to the tenderer to present in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full with) all requirements outlined in the Terms of Reference.

Tenderers are requested to include their technical proposal (envelope B) in one original and three hard copies and in a form of a read access secured CD.

The content of the technical proposal in the hard copies and the one in the CD must be identical.

In case of discrepancies between the hard copies and the CD, the hard copies shall take precedence.

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide:

For award criterion 1

A presentation of the subject demonstrating an in-depth understanding of:

- the general objective of the assignments, context, nature and results to be achieved;
- the concepts and research issues as well as policies related to the assignments.

For award criterion 2

- A detailed description of the envisaged methodological approach, including the capacity to develop research guidelines for the collection of information / data within these case studies, the adequacy of conceptual framework for data analysis, the relevance of the tools and approach for data collection as derived from the description of the number of interviews, type of interview partners, number of observation days/days spent within each enterprise, number of researchers per enterprise.
- A detailed description of the following crucial aspects: Capacity to identify potential enterprises and gain access to them (recruitment), **Proof of permission to access at least four enterprises**, geographical balance of selected countries, positioning of enterprises in industrial clusters, the quality of the interviews carried out (outline and duration of the interviews, relationship between interviewee and interviewer), quality of observation guidelines and the quality in the use of the information derived from the interviews (interviewer bias, triangulation, corroboration and member check).
- A detailed description of the approach/method proposed to analyse the thick descriptions provided and provide answers to the research questions.
- A detailed concept for outputs (research report, recommendations, best practice booklets and video snaps).

For award criterion 3

- A detailed work plan illustrating intended organisation and management of the tasks, including a list of team members and explanation of the nature and extent of their involvement in the study.
- Timetable with descriptions of the deliverables (refer to point 2.7).
- A preliminary assessment of likely difficulties (risks) in carrying out the work and a proposal for actions to be taken to overcome those.

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Manager or two different persons can be identified. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

In addition to the above the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 10% of the work by value (or of *all* subcontractors if total subcontracting is above 40% of the work by value) as requested in point 4.2.

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

5.3. Financial evaluation

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

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

*Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) * Y.*
Where Y = price weighting (see the complete formula under point 5 above)

Information concerning price

- The prices quoted must be fixed and not revisable. Prices must be quoted in EURO and include all expenses.

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted. [For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.

[For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.]

[In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".]

5.4. Financial Proposal / Financial Scenario

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

The Financial Scenario should clearly match the Terms of Reference and the estimate of value. All services that shall be procured should be included.

Price schedule table for both phases

1)	Names / positions of the Experts	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending meetings at Thessaloniki - see point 2.5	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommodation, etc
	2c) Other administrative expenses including professional proof-reading and editing in English of final report - see point 2.4.2	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+2b+2c)				
3)	Total Price (Total Financial Offer TFO)= Subtotal 1 + Subtotal 2			

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

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

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will be the price taken into account (not applicable for global price contract). Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

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

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1. Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 4 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.
- a read access secured CD containing the submitted in paper form technical proposal

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

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

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

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

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

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

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

ANNEX G

Questionnaires 1-4

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

ANNEX H

Cedefop Style Manual

ANNEX I

Models of power of attorney

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

ANNEX J

Model of Letter of Intent for Subcontractor/s

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