

Registration No. 211

Date: October 2, 2025

**Approved by**  
**Carmen Liana RONCEA PAVELIUC**  
**Financial Director**

**Revised by**  
**Monica CĂLIN**  
**Project Manager**

**Call for Applications**  
**“OPEN CALL”**  
**for Consultancy Services for Policy Analysis Report**

By applying, **candidates** fully and unreservedly accept the conditions set out in this selection procedure, regardless of their own terms or conditions, which they hereby waive. Candidates are expected to carefully review and comply with all instructions and complete all forms detailed in this **Application Documentation**. Failure to apply containing all required information and documentation by the specified deadline will result in the rejection of the application.

## I. INSTRUCTIONS TO CANDIDATES

These instructions set out the rules for selecting, awarding, and implementing a consultancy services procurement contract financed under Grant contract no. CN 2022/439-850.

<p><b>1. Information on the Contracting Authority</b> The procurement procedure will be carried out by Roma Education Fund Romania based in Sachelarie Visarion 63, Bucharest, Romania, phone number +0212000600, e-mail <a href="mailto:achizitii@roma.education">achizitii@roma.education</a> legally represented by Mr. Ciprian Cătălin Necula, executive president, as Contracting Authority.</p>
<p><b>2. Type of contract</b> Individual Consultancy Services (Non-Staff Category)</p>
<p><b>3. Funding source</b> Grant Contract No. CN 2022/439-850 financed by the European Commission. Title of the action <i>“EU Regional Action for Roma Education: Increased Education Support and Opportunities for Roma Students in the Western Balkans and Turkey (RARE), phase II”</i>.</p>
<p><b>4. The subject of the contract</b> Consultancy Services for Policy Analysis Report on Assessment of Strategies, Policies and Instruments of the Education Systems in the Countries of Western Balkans and Türkiye that prepare Roma children and youth for the labour market.</p>
<p><b>5. The estimated contract budget is EUR 7,500 (gross amount, inclusive of all taxes and charges)</b> <b>Applications with a proposed amount exceeding the estimated contract budget will be rejected.</b> Financial data provided by the candidate in the standard tender form (Annex No. 3) must be expressed in <b>Euro</b>.</p>
<p><b>6. Language</b> Applications and all correspondence related to the tender exchanged between the candidate and the Contracting Authority must be written in English, which is the language of the procedure.</p>
<p><b>7. Application Validity Period</b> The application must be valid for at least <b>30 days</b> from the deadline for submission.</p>
<p><b>8. Period of the contract</b> Six (6) months from the date on which the contract is signed by the last party.</p>
<p><b>9. Applicable law to the present procedure</b> This procurement is being carried out through an OPEN CALL procedure, in accordance with the REF procurement methodologies, which have been developed based on the Practical Guide on Contract Procedures for European Union External Actions (PRAG): <a href="https://wikis.ec.europa.eu/display/ExactExternalWiki/1.+Introduction">https://wikis.ec.europa.eu/display/ExactExternalWiki/1.+Introduction</a></p>
<p><b>10. Procurement procedure</b> <b>“OPEN CALL”</b> This procedure is carried out under conditions of equality and in compliance with the following principles: a) transparency in the procurement processes b) equal treatment and non-discrimination for all potential candidates c) competition d) sound financial management (principles of economy, efficiency and effectiveness)</p>

## **11. Common Procurement Vocabulary (CPV)**

73210000-7 *Research consultancy services*

## **12. Award criteria**

Award criteria will be the ***“Best Value for Money”***.

The contract will be awarded based on a combination of qualitative and quantitative factors that deliver the best value for money.

## **13. Submission of Applications**

Applications must be submitted to the Contracting Authority via email at: [achizitii@roma.education](mailto:achizitii@roma.education)

## **14. Deadline for submission of Applications**

**October 17, 2025**

Any request for additional information or clarifications regarding the Application Dossier must be submitted in writing via email to [achizitii@roma.education](mailto:achizitii@roma.education) no later than October 13, 2025. Responses to requests for clarification will be published on the website and communicated to all candidates invited to participate in the tender process, if any have been invited.

## **15. Assessment of Applications**

The aim of this stage of the selection process is to verify that applications comply with all requirements set out in the Application Dossier. An application is deemed compliant if it satisfies all conditions, procedures, and specifications in the Application Dossier.

An application will be considered non-compliant in the following cases:

- It is submitted after the deadline or sent to a different email address than the one specified in the Application Dossier.
- It is submitted by a candidate who does not meet one or more of the eligibility conditions stated in the Application Dossier.
- The candidate does not respond to requests for clarification, or the response is not submitted within the established timeframe.
- The application does not comply with the requirements specified in Section II.
- The financial proposal exceeds the estimated value indicated in the Application Dossier.

Applications that do not fall under any of the situations mentioned above will be considered compliant.

During the evaluation of applications, clarifications or additional information may be requested from candidates at any time. Any such request must be made in a manner that does not distort or compromise fair competition.

Requests for clarification and the responses must be submitted in writing. No change to the price or substance of the proposal may be requested or accepted, except when necessary to correct arithmetical errors identified during the evaluation. Errors will be corrected by the Contracting Authority as follows:

- Where there is a discrepancy between amounts in figures and amounts in words, the amount in words will prevail.
- Except for lump-sum contracts, where there is a discrepancy between a unit price and the total amount obtained by multiplying the unit price by the quantity, the unit price as quoted will prevail.

Amounts corrected in this way will be binding on the candidate. If the candidate does not accept them, the application will be rejected.

The deadline for responding to a request for clarification will be a minimum of two (2) working days. Requests for clarification or additional information will be governed by the principles stipulated in this document. Clarifications or additions will only be requested and accepted to the extent that they do not create an advantage for any candidate.

If multiple compliant applications receive the same score following the evaluation, the Contracting Authority may request the candidates concerned to submit revised financial proposals.

**Alternative or variant proposals will not be accepted or considered. Only applications that fully comply with the specified requirements will be evaluated.**

#### **15. Notification of award**

By applying, the candidate agrees to receive notification of the result of the procurement procedure by electronic means.

The notification is received on the date when the contracting authority sends it to the electronic address referred to in the offer.

The contracting authority will inform all the candidates about the award decision.

#### **16. Appeals**

The candidates who believe they have been adversely affected by an error or irregularity during the award process have the right to file a complaint.

The deadline for submitting the appeal is three working days from the date of notification of the result procurement procedure.

The appeal will be addressed to the Contracting Authority and will be sent by e-mail to [achizitii@roma.education](mailto:achizitii@roma.education)

The appeal submitted after this deadline will be rejected as late. The appeal must be accompanied by all the documents on which it is based. Each appeal will be answered within no more than two working days from the date of registration of the appeal.

The appeal settlement meeting is not public.

The dispute settlement commission may dismiss the complaint if it is found to be unfounded, late, or premature. If the complaint is admitted, appropriate remedial measures will be ordered if feasible, or the procurement procedure may be cancelled.

If the appellant is not satisfied with the answer received from the Contracting Authority with reference to his appeal, he may file a complaint according to the provisions of Section 2.12. of the PRAG.

#### **17. Signature of the contract**

The contract will be signed only after the deadline for filing a complaint will be ended.

If such an appeal is received, the contract will be signed only after the communication of the result of the appeal analysis.

## **18. Ethics clauses and code of conduct**

### **18.1 Absence of conflict of interest**

The candidates must act independently and without any conflict of interest. They must not have any relationship, direct or indirect, with other candidates or parties involved in the procurement process that could compromise their impartiality or objectivity.

Any attempt by a candidate to obtain confidential information, collude with competitors, or influence the evaluation committee or contracting authority during the procurement process will result in the rejection of their application.

A conflict of interest is defined as per Article 61 of Regulation (EU, Euratom) 2018/1046 of the European Parliament:

A conflict of interest exists when the impartiality and objective exercise of the functions of a financial actor or other person involved in budget implementation is compromised due to family ties, emotional connections, political or national affiliations, financial interests, or any other direct or indirect personal interest.

A conflict of interest can arise even if the person does not personally benefit from the situation. It is sufficient that circumstances could potentially impair their ability to act objectively and impartially.

### **18.2 Respect for Human Rights, Environmental Legislation, and Core Labor Standards**

The candidates must comply with human rights, applicable data protection rules, environmental legislation (including multilateral environmental agreements), and core labour standards as defined in relevant national law and International Labor Organization conventions.

The Contracting Authority maintains a "zero tolerance" policy toward sexual exploitation, abuse, and harassment. Physical abuse, punishment, threats, sexual abuse, exploitation, harassment, and verbal abuse, as well as other forms of intimidation, are prohibited.

### **18.3 Anti-Corruption and Anti-Bribery**

The candidates must comply with all applicable laws and regulations related to anti-bribery and anti-corruption. The European Commission reserves the right to suspend or cancel project financing if corrupt practices are discovered during the award process or contract execution and the contracting authority fails to address the situation.

"Corrupt practices" include offering bribes, gifts, gratuities, or commissions to induce or reward actions related to contract award or execution.

### **18.4 Unusual Commercial Expenses**

The candidates will be rejected, or contracts terminated if unusual commercial expenses arise. These include commissions not mentioned in the main contract, commissions not paid for legitimate services, commissions remitted to tax havens, commissions paid to unidentified payees, or commissions paid to front companies.

## 18.5 Breach of Obligations, Irregularities, or Fraud

The contracting authority reserves the right to suspend or cancel the procedure if breaches of obligations, irregularities, or fraud occur. If such issues are discovered after the contract award, the contracting authority may refrain from concluding the contract.

## 19. Cancellation of the selection procedure

If the procedure is cancelled, the candidates will be notified by the contracting authority.

### Cancellation may occur, for example, if:

- *the procurement procedure has been unsuccessful, namely where no suitable, qualitatively or financially acceptable application has been received or there has been no valid response at all.*
- *the economic or technical parameters of the project have changed fundamentally.*
- *unforeseen events that significantly disrupt the project's normal execution, making it unfeasible to proceed as planned.*
- *force majeure who renders normal implementation of the project impossible.*
- *all acceptable applications exceed the financial resources available.*
- *there has been a breach of obligations, irregularities or fraud in the procedure, where these have prevented fair competition.*
- *the award is not in compliance with sound financial management, i.e. does not respect the principles of economy, efficiency and effectiveness (e.g. the price proposed by the candidate to whom the contract is to be awarded is objectively considered disproportionate to the price of the market.*

Under no circumstances shall the contracting authority be held liable for any damages, including but not limited to loss of profits, arising in connection with the cancellation of a tender procedure, regardless of whether the contracting authority has been advised of the potential for such damages.

## 20. Personal Data Protection

In the context of participating in this selection procedure (e.g. submission of CVs) and/or during the implementation of the contract, the **candidate** acknowledges that their personal data may be processed and, where necessary, transmitted to EU institutions, agencies, or bodies. The candidate shall ensure that any other individuals whose personal data are provided within their application (e.g. referees) are informed of this possible transmission in accordance with applicable data protection legislation.

## 21. Conflict of Interest

Each application must include a declaration, in the prescribed form provided in Section III of the Tender Dossier (Annex 1), detailing the nature and extent of any potential or actual conflict of interest related to this procurement procedure.

To ensure equal treatment and prevent any potential conflict of interest, applications will not be accepted from individuals currently employed by REF Romania, REF Serbia, REF Slovakia,

REF Macedonia, or any other entities within the REF network. Former REF employees may apply, provided they disclose any circumstances that could give rise to a conflict of interest related to their previous role within the organization.

The individuals involved in management or decision-making for this procurement are:

- *Ciprian Cătălin Necula, Executive President*
- *Carmen Liana Roncea Paveliuc, Financial Director*
- *Claudia Craiu, Communication Director*
- *Monica Călin, Project Manager*
- *Dragana Rajic, Project Financial Manager*
- *Camelia Mihalache, Legal Counsel*
- *Claudia Gheorge, Project Officer*
- *Gabriela Dincă, Legal Counsel*
- *Ramona Zăbrăuțanu, Procurement Officer*
- *Nicolae Ider Ștefan, Community Development Researcher.*

**Drafted by**  
**Camelia MIHALACHE**  
**Legal counsel**

## II. TERMS OF REFERENCE

### Procurement of Consultancy Services for Policy Analysis Report

#### 1. Background

The Roma Education Fund (REF) has dedicated the past two decades to empowering Roma individuals through education. *With over 120 million Euros invested in diverse initiatives, REF has reached more than 100,000 Roma of all ages across 16 countries.* The EU-funded regional initiative “*Increased Education Support and Opportunities for Roma Students in the Western Balkans and Turkey (RARE II)*” builds on the achievements of the first phase (2018–2021) and aims to enhance educational inclusion and learning outcomes for Roma children and youth. *REF has implemented education services in the seven target countries involving over 4,500 Roma children from all educational levels.* The current project runs from January 2023 until December 2026 and is funded by the Directorate-General for Neighbourhood and Enlargement Negotiations of the European Commission.

#### 2. Context

Despite previous efforts, Roma children and youth in the Western Balkans and Türkiye continue to face structural barriers in accessing quality education and transitioning successfully to the labour market. Challenges include discrimination, socioeconomic disadvantages, school segregation, and gaps in policy implementation. The project operates in Albania, Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro, Serbia, and Türkiye, where national education systems are undergoing reforms and where tailored policies for Roma inclusion remain limited. REF’s current strategic focus includes strengthening community resilience, promoting gender equality, and supporting digital learning opportunities for Roma youth. Key stakeholders include Roma children, families, local and central authorities, and civil society organizations whose capacities are enhanced through the project’s activities. This consultancy is commissioned in this context to provide an in-depth analysis of vocational education policies and their effectiveness in preparing Roma youth for employment.

#### 3. Purpose and Objective of the Consultancy

Despite ongoing policy efforts at national and regional levels, Roma children and youth in the Western Balkans and Türkiye continue to face persistent structural barriers in accessing quality education and transitioning to the labour market. These barriers include discrimination, socioeconomic disadvantages, school segregation, and gaps in policy implementation.

This consultancy ***aims to conduct an in-depth policy analysis*** of education systems and labour market integration strategies in the seven target countries (Albania, Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro, Serbia, and Türkiye), focusing on vocational education and training (VET) programs in the public educational system and labour market policies specifically for Roma youth, identifying systemic barriers and good practices.

The consultant will produce a comprehensive policy analysis report that includes:

- An overview of the general vocational education and training landscape,

- A comparative analysis of Roma youth participation in VET across countries,
- Country-specific snapshots highlighting unique contexts and practices,
- Identification of key gaps and obstacles in educational and employment transitions,
- Best practices and examples of successful policies,
- Strategic, actionable recommendations aimed at improving educational and employment outcomes for Roma youth.

The report will feature a regional overview, a country-by-country breakdown, and an executive summary with key insights for policymakers, educational institutions, and international stakeholders.

The analysis will focus on:

- Reviewing existing policies on Roma education and labour market integration, with attention to both their design and their actual implementation,
- Assessing the impact of VET programs on Roma youth employment,
- Evaluating labour market strategies, with a focus on funding, stakeholder coordination, and alignment with broader EU frameworks,
- Identifying policy gaps and systemic obstacles such as discrimination, gender inequalities, or rural disadvantages that hinder successful transitions from education to employment,
- Providing evidence-based, actionable recommendations to strengthen inclusion, improve policy effectiveness, and expand opportunities for Roma youth.

The final deliverable is intended to serve as an advocacy tool for the Roma Education Fund (REF) and its partners, supporting informed policy-making processes at both national and regional levels aimed at strengthening educational and professional pathways for Roma youth.

#### 4. Methodology

The application should include a short overview of the proposed methodology towards producing the policy report. The candidate is invited to propose the best methodological approach which would enable adequate assessment of strategies, policies and instruments of the education systems in the countries of Western Balkans and Türkiye that prepare Roma children and youth for the labour market. If selected, the candidate should prepare a fully-fledged research and policy analysis methodology once the contracting and the initial documents review and consultations with the REF team are done. The methodology should be placed in the Inception Report (a detailed plan of work) and should include details related to the research instruments to be used (i.e. on the review and policy analysis methods, such as documents review, online interviews, online focus groups, triangulation of data and information, of findings, etc.). It can also include an adequate choice of other methods (typically, such as SWOT analysis, stakeholders' analysis, surveys, questionnaires, policy impact assessment, etc.). The plan should also ensure all the findings are evidence based, all the conclusions are based on the generated findings (data and information), and in turn all recommendations on the formed conclusions.

## 5. Scope of Services and Tasks

This assignment will use a mixed-methods approach conducted over 30 working days, primarily relying on:

- A comprehensive desk review, gathering secondary data through a comparative matrix across all seven countries,
- Triangulation of findings with scientific literature to ensure analytical depth and validity, alongside validation through a limited number of key informant interviews with targeted stakeholders. (e.g., policymakers, NGOs, VET providers).

The analysis will identify gaps, structural barriers, and best practices for the inclusion of Roma youth in vocational education systems. The study's final output will be a policy report containing clear, tangible, and evidence-based recommendations designed to inform and support decision-makers in enhancing educational and employment outcomes for Roma youth in the region.

The consultant will be responsible for the following tasks:

**A. Inception Report** – outlining the proposed methodology, work plan, and timeline.

**B. Desk Research and Literature Review:**

- Conduct a comprehensive review of national and regional policies on vocational and training education – including Roma-related issues – and on labour market integration in the project target countries, covering the vocational education and training (VET) programs in the public educational system and labour market policies specifically for Roma youth
- **Analyse relevant studies, reports, and statistical data** from credible sources, including government agencies, civil society organisations (CSOs), and European Union institutions.

**C. Stakeholder Consultations:**

- Conduct key informant interviews (a total of 7-10 interviews with high-level experts, one or two per country/region) and one regional online focus group with project managers to validate initial findings and gather nuanced insights.

**D. Comparative Policy Analysis:**

- Compare policies across project target countries and evaluate their effectiveness in addressing Roma youth's educational and employment needs,
- Identify best practices and models that could be replicated in other countries.

**E. Report Development:**

- Prepare a policy analysis report summarizing key findings, best practices, challenges, and policy recommendations,
- Include a country-by-country breakdown and a regional overview,
- Develop an executive summary with key insights for policymakers and stakeholders.

**F. Presentation of Findings:**

- Present key findings and recommendations in a public event.
- Provide a PowerPoint presentation summarizing the main points of the report.
- The Consultant shall be available to deliver the presentation during one day in March/April, at the public event organized for this purpose.

## 6. Coordination and Quality Assurance

Maintain ongoing communication with the REF team throughout the consultancy.  
Ensure timely delivery of all outputs and incorporate feedback constructively.  
The final report will be submitted after integrating the REF team's feedback.

## 7. Timeline and Working Arrangements

**Estimated Start Date:** End of October 2025

**Completion Date:** By mid-February 2026

**Maximum Working Days:** 30

**Location:** Remote

## 8. Eligibility and Participation

Participation in this procurement procedure is open to all individual consultants (natural persons) who can demonstrate substantial academic and professional experience in research and policy analysis in educational sciences, sociology, public policy, or other related social science disciplines.

Participation is subject to the absence of any exclusion grounds in accordance with applicable procurement rules, including but not limited to conflicts of interest, fraud, or professional misconduct. Candidates must submit a signed Declaration of Honour, as provided in Annex 1 to these Terms of Reference.

## 9. Qualifications and Experience

Candidates fulfilling the following criteria are encouraged to apply:

- A Doctoral degree (PhD) in Educational Sciences, Sociology, Public Policy, or a related social science discipline is strongly preferred. Candidates holding a master's degree with a distinguished record of relevant publications and significant research experience will also be considered.
- At least three (3) years of postgraduate professional experience in academic research and/or educational policy analysis and/or social research, with a focus on education systems, curriculum development, or labour market integration.

The candidate shall demonstrate:

- **Research Competencies:** Proven expertise in qualitative and quantitative research methodologies, including policy analysis, stakeholder interviewing, and statistical data analysis (knowledge of software such as SPSS, STATA, Jamovi, JASP, or R is an asset). The ability to synthesize complex data into clear, evidence-based reports is essential.
- **Publications:** A strong record of peer-reviewed academic publications related to education, social inclusion, Roma communities, or labour market transitions is an advantage.
- **Relevant Experience:** Experience conducting policy analysis at national or regional levels, within the Western Balkans is preferred.

- **Thematic and Contextual Knowledge:** Solid understanding of Roma inclusion policies, labour market dynamics, and the education and employment systems in the target countries.
- **Skills:** Excellent analytical, communication, and report-writing skills.
- **Language Proficiency:** Fluency in English is mandatory; knowledge of Romani or local Balkan languages is an asset.

## 10. Required documents

To enable a thorough and fair assessment of candidates' eligibility and qualifications, the candidates are requested to submit the documents below. These documents are intended to demonstrate compliance with the minimum eligibility criteria and relevant professional experience:

- a. A detailed curriculum vitae (CV) outlining academic qualifications, professional experience, and relevant research or consultancy assignments.
  - b. Copies of academic diplomas or certificates confirming the required educational qualifications (e.g., Master's or Doctoral degree).
  - c. A list of relevant publications, if applicable, with links or copies of selected key works.
  - d. A brief description of previous projects or policy analyses conducted related to education, social inclusion, or labour market integration, preferably in the Western Balkans or similar contexts.
  - e. **Documentary evidence of similar assignments**, which may include:
    - ✚ copies of relevant contracts, and/or
    - ✚ recommendation or reference letters, including contact details of referees, and/or
    - ✚ other supporting documents that clearly demonstrate the required experience.
- Note: It is recommended that all supporting documents to be presented in English, where such documents are issued in a language other than English, the Contracting Authority reserves the right to request the translation.*
- f. A signed Declaration of Honour confirming the absence of grounds for exclusion, as stipulated by applicable procurement rules (**Annex 1**).
  - g. The technical proposal (**Annex 2**)
  - h. The financial proposal indicating daily rates and estimated workdays (**Annex 3**).

The candidates are encouraged to provide clear and concise documentation sufficient to verify their qualifications and experience relevant to the scope of the assignment. The contracting authority reserves the right to request additional supporting documents or clarifications, if necessary, during the evaluation process.

## 11. Evaluation and Award Criteria: “Best Value for Money”

Tenders will be assessed through a two-stage evaluation: technical (80%) and financial (20%).

### A. Technical Evaluation (80%)

Criterion		Max Points	Scoring Guidelines
1	<p><b>Academic Qualifications</b></p> <p><i>This criterion focuses on the highest level of formal education, serving as a guarantee of in-depth theoretical and methodological competencies.</i></p>	5	<p><b>5 points</b> – The candidate holds a PhD in a <b>directly relevant field</b> (e.g., educational policies, sociology of minorities, social sciences applied to the labour market), or the doctoral thesis is on a topic related to the project.</p> <p><b>3 points</b> – The candidate holds a PhD in a relevant field (e.g., social sciences, educational sciences, public policies or related social sciences.).</p> <p><b>1 point</b> – The candidate holds a Master in a relevant field (e.g., social sciences, educational sciences, public policies or related social sciences.).</p>
2	<p><b>Relevant Professional Experience</b></p> <p><i>Evaluates practical experience in designing and implementing research projects similar in scope and methodology. Focus is on research projects, not general consultancy.</i></p>	8	<p><b>7–8 points</b> – Substantial experience or leadership role in research projects that are comparative, multi-country, and use mixed-methods, on socio-educational topics.</p> <p><b>4–6 points</b> – Experience in coordinating or implementing complex research projects involving either a comparative, multi-country component or mixed-methodology.</p> <p><b>1–3 points</b> – Experience in academic or applied research projects of limited scope (e.g., national studies, single-method research).</p>
3	<p><b>Quality and Relevance of Publications</b></p> <p><i>Assesses the ability to complete research and disseminate it rigorously. Quality is prioritized over quantity. Publication lists or links may be requested.</i></p>	7	<p><b>6–7 points</b> – Consistent portfolio of publications in high-prestige peer-reviewed journals (WoS indexed with IF&gt;1) and/or public policy reports with proven impact, directly relevant to the project topic.</p> <p><b>3–5 points</b> – At least 1–2 articles in peer-reviewed international journals or lead author of major policy analysis reports published by recognized think-tanks or international organizations.</p> <p><b>1–2 points</b> – Publications in conference proceedings, book chapters, or internal research reports (grey literature).</p>

4	<p><b>Thematic and Regional Expertise</b> <i>Evaluates the application of academic and research knowledge in the specific context of the project.</i></p>	5	<p><b>5 points</b> – Research portfolio and publications demonstrate deep expertise at the intersection of the thematic areas and clear geographic focus on the region of interest. <b>3–4 points</b> – Research and publications show a clear focus on one of the key areas (VET, labour market, Roma inclusion) and/or on the CEE/Balkans region (<i>A proven record of engagement with relevant stakeholders, institutions, or projects in the Western Balkans region, specifically in one or more of the following countries: Albania, Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro, Serbia, and Türkiye, and/or prior research involving populations from these countries will be considered an asset.</i>)</p> <p><b>1–2 points</b> – Thematic and regional expertise is general, inferred from academic profile, but not supported by specific projects.</p>
5	<p><b>Research Questions</b> <i>Assesses the ability to translate general aims into specific, measurable, and relevant research questions, and the methodological maturity in formulating hypotheses.</i></p>	5	<p><b>5 points</b> – Research questions are exceptionally precise, showing deep analytical thinking. Hypotheses demonstrate thorough knowledge of the literature and policy context, serving as a genuine guide for the inquiry. <b>3–4 points</b> – Questions are clear, well-formulated, and cover all key aspects of the ToR. Hypotheses are plausible and appropriate for a qualitative context. <b>1–2 points</b> – Questions are vague or too general. Hypotheses are simple statements without a clear theoretical or contextual basis.</p>
6	<p><b>Working Hypotheses</b> <i>Assesses how clearly the candidate understands the context, justifies the need for the study, and aligns their aims with REF's objectives.</i></p>	5	<p><b>5 points</b> – Articulates a strategic vision. Clearly connects the study to broader policy debates and the ultimate goal of advocacy, demonstrating an exceptional grasp of what is at stake. <b>3–4 points</b> – Integrates their own knowledge of the context, shows a nuanced understanding of the challenges, and formulates clear, relevant aims. <b>1–2 points</b> – Restates information from the ToR. Demonstrates a basic understanding but adds no original perspective or value.</p>
7	<p><b>Document Search Strategy</b> <i>Assesses the</i></p>	5	<p><b>5 points</b> – Demonstrates in-depth knowledge of specific sources in the region (e.g., names national statistics institutes, specific program evaluations). The extraction plan is detailed and directly linked to the research</p>

	<i>realism and systematic nature of the documentary analysis plan.</i>		<p>questions.</p> <p><b>3–4 points</b> – Proposes a credible list of databases and types of grey literature. Inclusion/exclusion criteria are clear. The extraction plan is structured.</p> <p><b>1–2 points</b> – Mentions generic sources (e.g. “government reports”). Selection criteria are vague. The extraction plan is superficial.</p>
8	<p><b>Primary Qualitative Research (Component 2)</b></p> <p><i>Assesses the quality of the qualitative research design, from sampling to data collection and ethics.</i></p>	15	<p><b><u>Sampling Strategy (5 points)</u></b></p> <p><b>5 points</b> – Proposes clear selection criteria, justifies choice of stakeholder groups, and includes proactive strategies to diversify the sample, demonstrating critical thinking and a thorough approach.</p> <p><b>3–4 points</b> – Proposes clear selection criteria, justifies the choice of stakeholder groups, shows a good understanding of purposive sampling.</p> <p><b>1–2 points</b> – Selection criteria are overly simple.</p> <p><b><u>Data Collection Methods (5 points)</u></b></p> <p><b>5 points</b> – The interview guide is exceptional, demonstrating the ability to probe complex and sensitive topics. Justifies the choice of method (e.g., why individual interviews instead of focus groups for a particular audience).</p> <p><b>3–4 points</b> – Clearly describes the approach (e.g., semi-structured interviews) and attaches a solid interview guide with open-ended, relevant, and well-structured questions.</p> <p><b>1–2 points</b> – Mentions interviews, but the attached interview guide is generic, with closed-ended or superficial questions.</p> <p><b><u>Ethical Considerations (5 points)</u></b></p> <p><b>5 points</b> – Demonstrates a deep reflection on the specific vulnerabilities of the target group (Roma youth) and proposes additional measures to ensure their protection and uphold the "do no harm" principle.</p> <p><b>3–4 points</b> – Describes clear procedures for informed consent, anonymization, and data storage.</p> <p><b>1–2 points</b> – Mentions general principles (consent, confidentiality) without detailing the procedures.</p>
9	<p><b>Data Analysis Plan / Synthesis and Triangulation Plan</b></p> <p><i>Assesses the clarity and rigor of the analysis plan and, crucially, how data from</i></p>	10	<p><b>8–10 points</b> – Proposes a highly detailed analysis plan, possibly mentioning an analytical framework. The synthesis plan is sophisticated, showing how all data sources will be integrated to build a coherent and compelling narrative that answers the research questions in a complex manner.</p> <p><b>5–7 points</b> – Describes concrete analysis steps (e.g., coding, creating categories, identifying themes). The triangulation plan is clear: explains how interview findings will validate, nuance, or challenge data from documents.</p> <p><b>1–4 points</b> – Descriptions are generic (e.g., "we will</p>

	<i>different sources will be integrated.</i>		thematically analyze the interviews"). The triangulation plan is vague or missing.
<b>10</b>	<b>Data Validation / Handling Missing Data / Criteria for Conclusions</b> <i>Assesses the candidate's realism, intellectual honesty, and methodological transparency.</i>	5	<b>5 points</b> – Demonstrates advanced critical thinking by acknowledging the study's potential limitations. Proposes clear and defensible inference criteria, showing a mature understanding of how to build evidence-based conclusions. <b>3–4 points</b> – Proposes concrete quality assurance measures (e.g., triangulation, peer debriefing). Has a realistic plan for missing data. Criteria for conclusions are logical. <b>1–2 points</b> – Mentions concepts like "validation" but without concrete procedures. Criteria for conclusions are simplistic.

## B. Financial Evaluation (20%)

Criterion	Max Points	Scoring Guidelines
<b>B1. Price Competitiveness</b>	20	The proposal with the lowest price will receive the maximum score of 20 points. All other proposals will be scored proportionally.
<b>Subtotal – Financial Proposal</b>	<b>20</b>	

**Note:** Only proposals that pass the technical threshold (minimum 75 out of 80 points) will proceed to financial evaluation.

### 12. Evaluation Methodology

The selection will follow the “**Best Value for Money**” principle, combining both technical and financial scores. The evaluation process will consist of the following steps:

#### 12.1. Eligibility Screening

Only proposals that meet the **eligibility requirements** and the **minimum technical threshold** (minimum 75 out of 80 points) will be considered for full evaluation and ranking.

#### 12.2. Technical Evaluation (Maximum 80 Points – 80%)

The proposal will be evaluated against four main criteria, as detailed in Section II Point 11.

Only proposals scoring **at least 60 points** in the technical evaluation will qualify for financial evaluation.

### 12.3. Financial Evaluation (Maximum 20 Points – 20%)

Financial Score = (Lowest Price / Candidate's Price) × 20

### 12.4. Final Scoring and Award

The final score for each tender will be calculated as follows:

**Total Score (TS) = Technical Score(T)X0.8+Financial Score (F)X0.2**

Where:

**Technical Score (T)** = sum of points obtained for all technical criteria (max 80 points in your structure)

**Financial Score (F)** = sum of points obtained for all financial criteria (max 20 points in your structure)

The contract will be awarded to the tender with the **highest total combined score**, provided they meet all eligibility and technical threshold criteria.

## 13. Place of Performance

All services shall be delivered remotely.

## 14. Intellectual Property and Copyright

- 14.1. All intellectual property rights, including but not limited to copyright, authorship rights, design rights, and related rights in all materials, documents, products, and deliverables developed in connection with this contract shall be the sole and exclusive property of the Contracting Authority.
- 14.2. The Consultant irrevocably and unconditionally assigns, transfers, and waives in favour of the Contracting Authority all rights, titles, and interest in and to such intellectual property, for all uses and media, worldwide and for the full term of protection of such rights, without any additional remuneration other than that specified in the contract.
- 14.3. The consultant shall ensure that no third-party rights (including software, illustrations, text, or other materials) are used in the deliverables unless properly licensed and shall provide proof of such licenses upon request.
- 14.4. Any prior rights, methodologies, or proprietary tools used by the Consultant shall remain the property of the Consultant; however, the Consultant shall grant the Contracting Authority a royalty-free, non-exclusive, irrevocable, and perpetual license to use such elements, as embedded in the deliverables, for non-commercial, project-related purposes.

## 15. Data Protection and Confidentiality

- 15.1. The Consultant shall fully comply with all applicable national and, where relevant, European data protection laws and regulations, including the General Data Protection Regulation (EU) 2016/679 ("GDPR"), where applicable.

- 15.2. The Consultant shall process personal data solely for the purposes of performing the obligations under this Contract and shall not disclose or transfer such data to any unauthorized person or entity. This includes, without limitation, personal data of participants, beneficiaries, stakeholders, or the Contracting Authority's staff.
- 15.3. The Consultant shall apply appropriate technical measures to ensure a level of security appropriate to the risk, including measures to prevent unauthorized or unlawful processing, and to protect against accidental loss, destruction, or damage of personal data.
- 15.4. If the Consultant engages any third party in the performance of this Contract, the Consultant shall ensure that such third party is bound by equivalent data protection obligations through a written agreement containing adequate safeguards.
- 15.5. Upon completion or termination of the Contract, all personal data shall be securely returned to the Contracting Authority or permanently destroyed, unless the Contracting Authority provides written instructions to the contrary.
- 15.6. The Consultant shall notify the Contracting Authority without undue delay, and no later than 48 hours after becoming aware, of any personal data breach or unauthorized disclosure related to the performance of this Contract.

## 16. Originality of Work and Prohibition of Plagiarism

- 16.1. The Consultant warrants that all deliverables and outputs submitted under this Contract are original works, have not been copied or plagiarised from other sources, and do not infringe any third-party intellectual property rights.
- 16.2. All materials shall be properly referenced and cited when using or building upon pre-existing sources, research, or methodologies. The use of any AI-generated content must be expressly declared to the Contracting Authority and reviewed to ensure compliance with originality and quality standards.
- 16.3. The Contracting Authority may, at its sole discretion, subject any deliverable to plagiarism detection tools and reject any work found to be partially or wholly plagiarised or in breach of intellectual property rights.
- 16.4. In the event of plagiarism or intellectual property infringement, the Contracting Authority reserves the right to:
  - Terminate the Contract with immediate effect;
  - Withhold any unpaid amounts;
  - Require the reimbursement of any amounts already paid;
  - Pursue any other legal remedies available under applicable law.

## 17. Public Use and Dissemination

- 17.1. The Contracting Authority shall have the right to publish, disseminate, translate, adapt, or otherwise use the deliverables, in whole or in part, for non-commercial, educational, informational, or advocacy purposes, without the need for additional permissions or payment to the Consultant.
- 17.2. The Consultant may use the deliverables or make any public reference to the Contracting Authority or the project, only with the prior written consent of the Contracting Authority.

## 18. Payment Terms

- Payments are contingent upon the approval of deliverables.
- Payments will be made via bank transfer in EUR or RON (converted at the official BNR exchange rate on the invoice date).

- Payment will be made in three instalments:
  - a. **Advance Payment:** Up to 10% of the contract value may be requested in advance.
  - b. **Upon Delivery and Acceptance of the Report:** Payment of the agreed amount following the approval of the submitted report.
  - c. **Upon Presentation of Research Results at the Regional Event (1-day presentation):** Payment of the remaining balance will be made after the consultant presents the research findings during the one-day regional event, planned for March 2026, but no later than April 2026.

**Drafted by**

**Nicolae Ider ȘTEFAN, Community Development Researcher** \_\_\_\_\_

## ANNEX 1 DECLARATION OF HONOUR

### PART I – IDENTIFICATION FORM (NATURAL PERSON)

#### A. Personal Data

- First name: \_\_\_\_\_
- Family name: \_\_\_\_\_
- Date of birth: \_\_\_\_\_ Place of birth: \_\_\_\_\_ Country: \_\_\_\_\_
- Personal address: \_\_\_\_\_  
Postal code: \_\_\_\_\_ City: \_\_\_\_\_ PO BOX: \_\_\_\_\_ Country: \_\_\_\_\_
- E-mail: \_\_\_\_\_
- Telephone: \_\_\_\_\_

#### B. Identity Document

- Type of document:  ID card  Passport  Other: \_\_\_\_\_
- Document number: \_\_\_\_\_
- Issuing country: \_\_\_\_\_
- Personal identification number: \_\_\_\_\_

***Please enclose a legible copy of your identity document.***

#### C. Banking Details

- Account holder name: \_\_\_\_\_
- IBAN / Bank account number: \_\_\_\_\_
- Bank name: \_\_\_\_\_
- BIC / SWIFT code: \_\_\_\_\_ Branch code (if applicable): \_\_\_\_\_
- Address of the bank branch: \_\_\_\_\_ City: \_\_\_\_\_ Country: \_\_\_\_\_

### PART II – DECLARATION OF HONOUR

#### A. Declaration on exclusion criteria

I hereby declare on my honour that:

##### 1. Exclusion situations concerning myself:

- I am not bankrupt, in liquidation, subject to insolvency proceedings, my business activities are not suspended, nor am I in any analogous situation under Union or national law.
- I have not been convicted by a final judgment or final administrative decision for fraud, corruption, money laundering, terrorist financing, child labour, or human trafficking.

- I have not committed grave professional misconduct affecting my professional credibility (including negligent or fraudulent misrepresentation, undue influence on decision-making, infringement of intellectual property rights).
- I have fulfilled my obligations regarding taxes and social security contributions in my country of residence.
- I have not shown significant deficiencies in the performance of contracts financed by the Union, leading to early termination, penalties, or findings from audits/investigations.
- I have not created or used entities to circumvent legal or fiscal obligations.
- I have not resisted investigations, audits, or controls by competent authorities, including OLAF, EPPO, or the Court of Auditors.

## 2. **Non-final/existing investigations:**

- I am not subject to ongoing investigations, audits, or non-final administrative decisions that could affect my eligibility.

## **B. DECLARATION ON INDEPENDENCE AND CONFLICT OF INTEREST**

- I have no conflict of interest in relation to the contract/project for which I am submitting this declaration.
- I declare that I have prepared this application independently and autonomously, without any collaboration or coordination with other applications submitted in the same procurement procedure.
- I undertake to immediately inform the contracting authority of any potential conflict of interest that may arise during the execution of the contract.

## **C. DECLARATION ON SELECTION CRITERIA**

I declare that:

- I fulfil all professional and technical selection criteria specified in the tender documents.
- I have no professional conflicting interests which could negatively affect the performance of the contract.
- I do not have any established debt to the European Union or any executive agency implementing the Union budget.

## **D. ACCURACY OF INFORMATION**

- I certify that all information provided in my application or proposal is accurate, complete, and truthful.
- I acknowledge that the contracting authority may verify the information provided, in accordance with EU anti-fraud rules.
- I am aware that any false declaration may lead to exclusion from this and future contracts and may trigger legal consequences.
- I undertake to immediately notify the contracting authority of any change in the above-mentioned situations.

#### E. CONSENT TO VERIFICATION

- I acknowledge that the contracting authority may verify the information provided in this declaration, in accordance with EU anti-fraud rules (Regulation (EU, Euratom) No 883/2013 and Regulation (EU, Euratom) No 2185/96).
- I am aware that any false declaration may lead to exclusion from this and future contracts and may trigger legal consequences.
- I undertake to immediately notify the contracting authority of any change in the above-mentioned situations.

**Signed in (place):** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Full Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

#### Privacy Statement

By submitting this form, you acknowledge that you have been informed about the processing of your personal data by the Roma Education Fund for accounting and contractual purposes.

## ANNEX 2: TECHNICAL PROPOSAL FORM

Contract Title: \_\_\_\_\_

Candidate Name: \_\_\_\_\_

Date: \_\_\_\_\_

### A. GENERAL INFORMATION AND ELIGIBILITY

Information	Response / Details
Declaration on own responsibility confirming that I am not in any exclusion situations as per Article 136 of the EU Financial Regulation and applicable national legislation	<input type="checkbox"/> Attached and signed
Relevant professional experience in the required field ( X years)	<input type="checkbox"/> Detailed below
Availability for the contract period	<input type="checkbox"/> Confirmed

### B. PROFESSIONAL EXPERIENCE AND QUALIFICATIONS

*Period Role / Position Organization / Beneficiary Description of Activities and Results*

- *Relevant projects to be listed.*

#### Relevant Qualifications and Competences:

- *List degrees, certifications, and relevant trainings*
- *Technical or methodological skills applicable to the contract*

### C. TECHNICAL PROPOSAL / METHODOLOGY

***Instructions for the Candidate: Please complete this protocol to detail your technical proposal. The purpose of this document is to ensure the clarity, comparability, and methodological rigor of all applications. Fields marked with an asterisk (\*) are required.***

#### I. General Study Information

Title:

*The proposed title for this policy report*

## 1. Background and Rationale\* -

*Introduce the research topic. Briefly summarize the known literature and existing challenges regarding vocational education and the inclusion of Roma youth. Argue why this in-depth analysis is necessary and what added value the final report will bring.*

## 2. Overall Research Aims\*

*Specify the general goals of the study.*

*For example: to evaluate current policies, to identify systemic barriers, to document good practices, to formulate recommendations for advocacy, etc.*

*Please select the primary types of aim and explain:*

Exploration

Description

Evaluation

Comparison

In-depth Understanding

## 3. Research Questions\* *List the specific questions this study aims to answer.*

### 3.1 Primary Research Questions:

*(e.g., "What are the main systemic barriers that Roma youth face in their transition from vocational schools to the labor market in country X vs. country Y?")*

### 3.2 Secondary Research Questions:

*(e.g., "What role does career counseling play in the success of the transition?", "How do employers perceive Roma graduates of vocational schools?")*

## 4. Working Hypotheses / Expectations\*

*Describe any expectations or working hypotheses you have. These may relate to the types of barriers you expect to find, differences between countries, or successful practices. For qualitative research, these are flexible hypotheses, not rigid ones meant for statistical testing.*

## II. Data Collection Methodology

This research comprises two main components: (1) a documentary analysis of existing policies and literature, and (2) primary qualitative research through interviews.

## **Component 1: Documentary Analysis (Desk Research)**

### **1.1 Document Search Strategy\***

*Describe how you will identify relevant sources.*

Grey Literature: *(Regional strategies, national legislation, government reports, national strategies, European Commission documents, reports from local and international NGOs, World Bank reports, etc.)*

Academic Databases: *(e.g., Scopus, Web of Science, Google Scholar, ProQuest, etc.)*

### **1.2 Inclusion and Exclusion Criteria for Documents\***

*Specify the criteria used to select relevant documents (e.g., publication year, geographical relevance - the 7 target countries, document type - laws, strategies, evaluations, studies, thematic relevance - vocational education, Roma youth, labor market).*

### **1.3 Screening and Data Extraction Process for Documents\***

*Describe the stages you will follow to review the identified documents and extract relevant information. What key information (variables) will you extract from each document? (e.g., stated objectives of a policy, performance indicators, allocated budgets, target populations, barriers identified in previous reports).*

## **Component 2: Primary Qualitative Research**

### **2.1 Sampling Strategy for Participants and Case Studies\***

*The purpose of this section is to evaluate the methodological rationale in the construction of the sample.*

*A contact list will be provided by the Roma Education Fund.*

*Describe how you will select:*

Which key groups will you interview (e.g., Roma youth, graduates, teachers, school principals, inspectors, policymakers, employers, NGO experts)?

Selection Criteria: What criteria will you use to select participants from each group (e.g., purposive sampling to ensure diversity in gender, urban/rural settings, different economic sectors)?

## 2.2. Qualitative Data Collection Methods\*

*Please describe a draft interview guide for at least one of the stakeholder groups.*

## 2.3. Ethical Considerations\*

*Describe the procedures for ensuring research ethics, including: obtaining informed consent, ensuring confidentiality and anonymity, secure data storage, and the protection of vulnerable participants.*

## III. Analysis, Synthesis, and Quality Assurance

### 1. Data Analysis Plan\*

*Describe how you will analyze the collected data.*

*Analysis of Documentary Data: (e.g., content analysis of policy documents, comparative analysis of legislative frameworks across the countries).*

*Analysis of Qualitative Data: (e.g., thematic analysis of interview transcripts, identification of recurring themes, barriers, and good practices).*

### 2. Synthesis and Triangulation Plan\*

*Describe how you will combine and synthesize the data from both components (documentary and qualitative) to answer the research questions. How will you use the interviews to deepen or challenge the findings from the documentary analysis (triangulation)?*

### 3. Data Validation and Quality Assurance\*

*Describe the process through which you will ensure the credibility and robustness of the findings (e.g., triangulation of sources, peer debriefing, member checking/verifying interpretations with some participants).*

### 4. Handling Missing or Inconsistent Data\*

*Describe how you will address situations where information is incomplete, contradictory, or cannot be obtained (e.g., difficulties in accessing certain documents or stakeholders).*

### 5. Criteria for Drawing Conclusions\*

*Specify the basis on which you will draw conclusions. For example, a barrier will be considered "systemic" if it is confirmed by multiple data sources (documents, interviews with youth, interviews with policymakers).*

## IV. Management and Dissemination

## 1. Project Stages and Timeline\*

*Present the main stages of the research (e.g., Phase 1 - Desk review, Phase 2 - Fieldwork, Phase 3 - Analysis and Writing) in a timeline (table or Gantt chart).*

## 2. Software and Tools\*

*List the software you will use for bibliographic reference management (e.g., Zotero, Mendeley), qualitative data analysis (e.g., NVivo, MAXQDA, QualCoder –free, etc.), and other relevant tools.*

## 3. Proposed Structure of the Final Report\*

*Provide a detailed table of contents for the final report, highlighting how it will be structured to serve as an effective advocacy tool.*

## 5. Declaration of Truthfulness and Eligibility

- a. I declare that all information provided in this form is true and correct.
- b. I agree to provide any additional documentation necessary to verify my eligibility and experience.

## 6. Declaration of Commitment to Contract Performance

We confirm that we are committed to delivering the services outlined in this Technical Proposal and are available for the contract period. We acknowledge and agree with the Terms of Reference and applicable procurement rules.

**Candidate's Signature:** \_\_\_\_\_

### ANNEX 3 –FINANCIAL PROPOSAL FORM

The Candidate is required to provide the costs for the service. All costs should be presented in euros (€), as gross amounts including all applicable taxes. Please ensure that all costs are realistic and reflect the quality and standards specified in the Terms of Reference (TOR).

Contract Title: \_\_\_\_\_

Name of Candidate: \_\_\_\_\_

#### 1. Breakdown of Costs

Stages of the research	Unit	No. of Days	Daily Rate (EUR)	Total (EUR)
<i>e.g., Phase 1 - Desk review</i>	Day			
....	Day			
<i>Presentation of Research Results at the Regional Event</i>	Day	1		
<b>GRAND TOTAL</b>		<b>30</b>		

Notes:

1. Additional lines shall be introduced as necessary, depending on the structure proposed in the Technical Proposal.
2. The Daily Rate shall not exceed EUR 250 (all taxes included).

#### 2. Validity

I confirm that this financial offer is valid for a minimum of 30 days from the submission date and inclusive of all applicable costs.

#### Declaration

**I, the undersigned, certify that the financial information provided above is complete, accurate, and corresponds to the services proposed for the assignment.**

Candidate's Signature: \_\_\_\_\_

Date: \_\_\_\_\_