EUROPEAN COMMISSION
DIRECTORATE-GENERAL
TAXATION AND CUSTOMS UNION
Resources
Management of programmes and EU Training

TENDERING SPECIFICATIONS

TAXUD/2015/AO-01

For the provision of services covering multifaceted EU training support programmes, eLearning development and communication services in the field of customs and taxation (B-TRAIN 3)

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TERMS AND ABBREVIATIONS

Animation	In contrast to an illustration, animation refers to the process of creating motion and shape change illusion
Atelier	Authoring tool used for courses developed under BT1, licence from U&I France
Blended learning	Training method and implementation process type, which is using composite of several different types of learning methods, e.g. traditional class-room learning, simulation training exercises and e-learning content, delivered either for a group of learners or individually via internet or both.
BT1	See B-Train 1.
BT2	See B-Train 2.
BT3	See B-Train 3
BT3 Dev	B-Train 3 Development team
B-Train 1	The first B-Train Framework Contract, established in 2006 and running up to 2010.
B-Train 2	The second B-Train Framework Contract for continuation and further evolution of the work established in B-Train 1
B-Train 3	The third B-Train Framework Contract subject of the current call for tenders.
Central EU Training Team	Team within DG TAXUD responsible to deployment of the multifaceted EU training
CFT	Call for Tenders. Also term ITT (Invitation to Tender) used.
Course	Term used to describe the collection of elements that make up training on a given subject.
CTT	See Central EU Training Team
Curriculum	A series of related courses.
Delivery methods	The way in which training is distributed to learners. BTRAIN 3 offers 3 alternative delivery methods: on optical media (DVD/CDROM), Intranet and collaborative networks via Internet (PICS) and through Learning Management Systems (maintained by Participating Countries nationally).
DG TAXUD	Directorate-General for Taxation and Customs Union, European Commission
eL	eLearning course
FAT	Factory Acceptance Test (integrated part of development process for eLearning courses)
FQP	Framework Quality Plan
FR	Financial Regulation – Regulation (EU, Euratom) n° 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) N° 1605/2002 - OJ L 298, p. 1 of 26.10.2012.
FWC	Model Framework Contract

Instructional Design	Systematic use of a design method and of principles of instruction to ensure that learners acquire the skills and knowledge essential for successful completion of specified performance goals. One popular Instructional Design (ISD) model is called the ADDIE model. It includes the steps Analysis, Design, Development, Implementation and Evaluation, from which the acronym is taken.
DTM	Delivery Tracking Matrix
Interaction	A two-way exchange of information between the learner and the computer.
Interactivity	Interactivity provides the opportunity for the learner to engage with the subject matter intellectually and in an active way and it provides automatic responses by the computer to actions of the learner. The final goal of interactivity is to stimulate learner reflection on the learning subject, maintain learner interest, provide a means of practice, and ultimately increase learner understanding and memorising of the training content.
IT	Information Technology
ITT	Invitation to tender. See also Call for Tenders (CFT).
LCMS	Learning Content Management System
LCS	Learning Content system
Learning content	All forms of pedagogical information and subject matter material in form of / delivered by media or platform, suitable for using on training and education and self-paced learning
Learning Management System	A Learning Management System is a software package that enables the management and delivery of learning content and resources to students. Most LMSs are web-based to facilitate "anytime, anywhere" access to learning content and its administration.
Learning Objective	The clear and measurable statement of the behaviour that must be observed after training is concluded in order to consider the training a success. Synonyms: performance objective, course objective.
Learning Unit	A learning unit is a mandatory division of a course. It corresponds to the Sharable Content Object in the SCORM terminology. It contains one or more Learning Activities. Synonym: lesson.
LMS	Learning Management System
Localisation	The adaptation of a EU eLearning course (Master version in English language) into national languages, meaning translation process (text & voice) and the integration and adaptation of translated content back into the course (further localisation measures, eg. course adaption to specific cultural diversity in national countries, was not centrally addressed under BT2)
MPR	Monthly Progress Report
MS	Member States
Multimedia	The integration of different media into a screen, including text, graphics, audio, animation and video.
OD	On Demand
Off-line	Operation of a computer while not connected to a network.

On-line	Operation of a computer while connected to a network.
PA	Partnership agreement (see also Annex 16)
PC	Participating Country in one of the Programmes Currently, these are the 28 EU Member States and Albania, Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey.
PD	Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2044/18/EC ("Procurement Directive/PD"), OJ L 94, p. 65 of 28.3.2014.[1]
PICS	Programmes Information and Collaboration Services
QA	Quality Assurance
QC	Quality Control
QMS	Quality Management System
QP	Quality Plan
RAP	Rules of application – Commission Delegated Regulation (EU) N° 1268/2012 of 29 October 2012 on the rules of application of Regulation (EU, Euratom) N° 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union – OJ l 362, p.1 of 31.12.2012.
RfA	Request for Action
SC	Specific Contract
Screen	A screen is the interactive and multimedia equivalent to a slide. It includes usually several objects such as a title, a navigation bar and content objects. Content objects are used to display texts, text lists, pictures, animations, video, diagrams and questions with or without feedback. Any type of content object may be mixed to build a screen. The amount of content which can be displayed on a screen is limited by factors such as: space availability, readability, underlining of key points, topic homogeneity and amount of content on the screen. Secondary information may be displayed on user's request on top of the main screen layer.
Section	An optional division of the course which contains several Learning Units.
SfA	Sent for Acceptance
SfR	Sent for Review
Smart Builder	Authoring tool used for courses developed under BT2, licenced from Suddenly Smart (see http://www.suddenlysmart.com/msa.htm).
SME	See Subject Matter Expert
SQI	Service Quality Indicators
SQP	Specific Quality Plan

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[1] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2004:134:0114:0240:EN:PDF

Storyboard	An outline of a multimedia project in which each page represents a screen to be designed and developed. Used extensively in courseware creation. (verb) The process of creating a Storyboard. "We are going to Storyboard this section."
Subject Matter Expert	Subject Matter Experts are the people providing the project team with the content knowledge. They are appointed by the National Administrations. However, the project team should bear in mind that they are 100% dedicated and may have limited availability.
Task analysis	A process of examining a given job to define the discrete steps (tasks) that ensure effective and efficient performance of the job's requirements.
TBP	Total budget provision
TBP/P	Total budget provision: Provision for products
TBP/SD	Total budget provision: Services and Deliverables
TBP:T&S	Total budget provision: Provision for travel and subsistence
Terminal objective	A learning objective the learner should be able to master after completing a specific Learning Unit.
Text-to-speech	A text-to-speech system converts normal language text into speech.
Tracking	When the course is delivered through a SCORM compliant LMS, tracking of the student progress and scores is available at the Learning Unit level.
VET	Vocational Education and Training
WP	Work Package
XTM	XTM is a computer aided translation (CAT) tool and translation management system (TMS) used under BT2, licenced from XTM-International Ltd (see http://www.xtm-intl.com)

1 CONTEXT OF THIS CONTRACT

The European Commission/DG TAXUD has been providing since 2007 electronic learning materials to help national customs and tax administrations and their staff as well as traders and citizens throughout the European Union (EU) better understand and implement EU customs and taxation related legislation and procedures.

Since 2012, the common eLearning development program of DG TAXUD has been complemented by a series of further training & development initiatives at national and EU level, which comprise elements like an EU Competency Framework and competency-based EU reference training programs (for customs), common learning events and enhanced collaboration concepts and mechanisms.

The underlying motivation for DG TAXUD's activity in this field is to support the consistent implementation of EU customs and tax legislation and policies, to reinforce high quality service provision and to foster most consistent performance in the customs and tax profession within the EU,

- through the production of centrally developed **training** content (eLearning, blended learning) and further appropriate **learning support** measures,

- through the introduction of **common competency-based human resource management** and staff development and

- through **communicating** consistent messages on customs and tax policies and about efficient customs and taxation practices throughout the EU.

With the realisation of this work, DG TAXUD has been since 2005 supported by external consultants. The envisaged contract should ensure the continuation of highly proficient external consultancy provision in this field for the coming years.

The expected outputs of this envisaged Framework Contract are considered critical to improve the administrative capacity of customs and tax authorities[2] in the EU through efficient and innovative training and competency-based staff development. This in turn will lead to more uniformity and efficiency of customs and tax operations throughout the EU and further enhance consistent performance and harmonised implementation of common legislative measures.

2 LEGAL BASIS

The Customs 2020[3] (Art 10) and Fiscalis 2020[4] (Art 10) Cooperation programmes - similar to their predecessor programmes - endorsed and adopted the principles of 'Human Competency Building' through training and people development while specifying that the current common training approach of the Union should develop into a multifaceted training support programme for the EU.

> *'Human competency-building should also be carried out in the form of common training and should be realised through the Programme. Customs officials need to build up and update their knowledge and the skills required to serve the needs of the Union. The Programme should be essential to strengthen human capacities through enhanced training support that targets*

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[2] Objective as laid down in the Annual Management Plan of DG TAXUD

[3] Regulation (EU) No 1294/2013 of the European Parliament and of the Council of 11 December 2013 establishing an action programme for customs in the European Union for the period 2014-2020 (Customs 2020)

[4] Regulation (EU) No 1286/2013 of the European Parliament and of the Council of 11 December 2013 establishing an action programme to improve the operation of taxation systems in the European Union for the period 2014-2020 (Fiscalis 2020)

customs officials as well as economic operators. To that end, the current common training approach of the Union, which was mainly based on central eLearning development, should develop into a multifaceted training support programme for the Union.' (extract, recital from C2020 Programmes').

Common and coordinated communication actions in the field of customs and taxation are further supported and mandated by the 2020 Programs as well as forming part of the EU Commission's information and communication policy[5].

The activities under this Framework Contract are supposed to be predominantly financed under the budget lines of the Fiscalis 2020 and Customs 2020 Programmes, but other TAXUD budget lines may additionally provision certain activities, such as for example certain internal communication actions.

3 SCOPE OF THIS CALL FOR TENDERS

The general scope of this call for tenders is to design, develop, promote, disseminate and maintain a multifaceted training support programme for the Union in the domain of customs and taxation throughout the programmes' period 2015-2020 (and possible successor programmes), targeting customs and taxation officials, economic operators and other relevant stakeholders in the EU Member States and candidate/associated countries (Programme Participating Countries – PC). The Programme Participating Countries are listed in section 6.2. Some services and products may also be addressed to the general public and stakeholders worldwide.

Therefore this call for tenders covers the provision of:

- eLearning solutions: to design, develop, localise, update, maintain and disseminate e-Learning courses and other eLearning solutions. The current three eLearning formats are: legal/operational modules, IT modules and performance eLearning courses. In function of the technological evolution, DG TAXUD may request the provision of different electronic formats fitting within the concept of modern blended learning methods, also including on-line supported modules and/or modules that are fit for mobile learning;

- consultancy in the area of human capacity building: to provide consulting services to DG TAXUD, national administrations and other relevant stakeholders with regard to designing, developing and implementing the aforementioned common multifaceted training and staff development programmes and to further enhance this initiative in line with international standards and future developments;

- technical support in the form of infrastructural solution design and developments, products and services: a separate provision is made available in order to cover on demand procurement and other costs required to fulfil the above mentioned objectives as well as similar support services and their delivery;

- communication support, related to DG TAXUD **internal and external** communication policy on customs and taxation topics. This may take the form of communication solution design and developments, provision of products and services. A separate provision is made available in order to cover procurement and other costs required to fulfil the above mentioned objectives as well as similar support service and their delivery.

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[5] Reflected as objectives in the annual Management Plan of DG TAXUD.

4 B-TRAIN 3 SPECIFICATIONS:

Key support activities requested under this call for tenders are supposed to fall within the areas addressed in this chapter.

All offers need to address the full range of service requirements as referred to in this chapter and to provide descriptive evidence of the tenderers' capacities in each activity area.

4.1 CONTINUATION OF CURRENT FWC SERVICES

Services to be provided under the new framework contract B-Train 3 (BT3) require the **take-over** (see section 6.1) and the **continuation of services and products** provided or developed under previous and current framework contracts in this field, B-Train 1 (BT1) and B-Train 2 (BT2), and are further described in this chapter.

4.1.1 EU Multifaceted Training Programme Development continuation

In particular, today's **multifaceted common Learning support programme** for customs and taxation should be strategically further developed and its implementation further supported and progressed under this call for tenders.

This initiative is based on recommendations deriving from two European studies[6] in the field of customs and in collaboration with EU national customs administrations, some trade organisations and other relevant stakeholders. A common training and educational framework to support Member States (MS) in developing the enhanced skills and knowledge, which customs professionals need to deliver high quality customs services throughout the EU, has been established in 2012 and been further put into practise in the period 2012-2015.
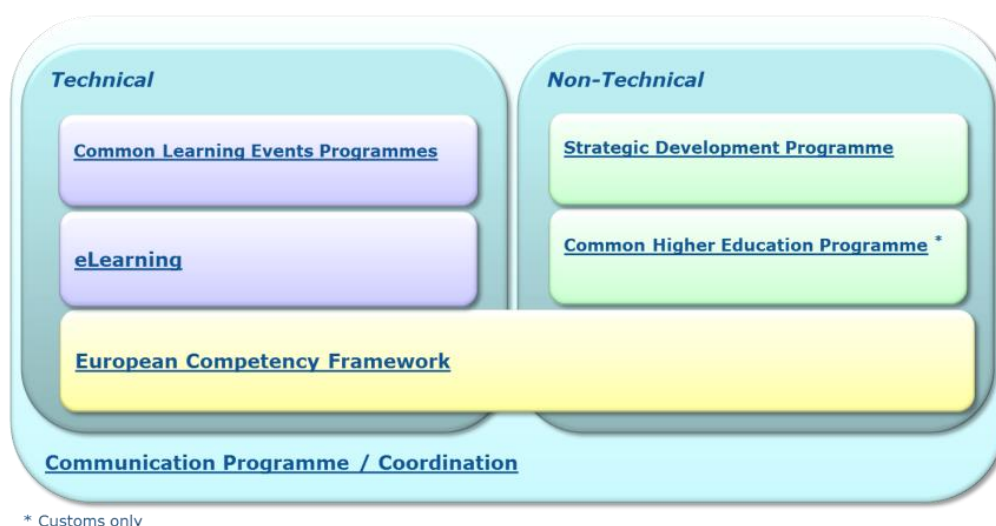
Figure 1: The multifaceted training approach

Strategically, the multifaceted training approach is formalised in the form of a human performance-building framework for customs, the 'Dublin Strategy 2012-2015' (Annex 11), and was followed at a later stage by a significantly more limited

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6 Feasibility Study "EU Customs academic training programme" and the report: "Development of a competency framework".

adaptation for taxation, in the form of a common initiative towards enhanced common taxation training, the 'Dublin Initiative 2014-2015' (Annex 12).

These reference frameworks/action plans provide the conceptual basis for the envisaged multifaceted common Learning programmes for customs and taxation and should be supported by this call for tenders.

The main building blocks of today's multifaceted training approach are composed of:

Note: Key initiatives of DG TAXUD's training programme, like 'eLearning' or 'EU Customs Competency Framework', are already incorporated as a building block in the multifaceted training approach, but they are also addressed specifically in more details under item 4.1.2 and 4.1.3.

- ***European Customs Competency Framework (EU CFW), developed in 2012-2014****:* designed to establish a comprehensive common view of the skills and knowledge required by Customs professionals. More information about the current state of play can be found on the Commission's [Europa website - CFW](#).

- ***EU eLearning course programme evolution (modernisation of current eLearning programme and linkage to EU competencies)****:* easy-to-use electronic training packages on a specific tax or customs topic can be blended with classic training methods at national level (by national administrations) or can be used as a standalone guide by any individual with basic computer literacy and access to a PC. eLearning courses with no sensitive content can be retrieved from the [Europa website - EU Training](#).

- ***Common Learning Event Programme (CLEP), an expertise building initiative between PCs, type 'train-the-trainer' events (piloted in 2014, implemented in 2015)****:* training events that the Participating Country (PC) can organise with the support of the Customs and Fiscalis 2020 programmes and with the intent of sharing their own expertise on any customs and/or tax topic with other PCs. The proposals are made on a pure voluntary basis, yet commonly agreed and structured through common annual event planning.

- ***Customs Common Higher Education Programme (CHEP) – designed in 2014/2015:*** a body of educational reference programmes for Customs professionals within Europe covering the competency requirements as defined in the above mentioned *European Customs Competency Framework*. An EU recognition concept for EU CFW aligned academic training programmes (MS/BA) should further support widest possible educational investments in Customs (designed in 2014/15, not yet applied);

- ***Strategic Leadership and Management Development Programmes (designed in 2015; not yet deployed)****:* advanced strategic and managerial training for current and future senior leaders

- ***Information, Collaboration and Coordination:*** currently mainly addressed through an EU on-line collaboration platform, named PICS, which can be used as a platform at EU level or for bilateral collaborations and exchanges.

4.1.2 EU eLearning programme implementation

The Central Training Team of DG TAXUD (CTT) works in close collaboration with other TAXUD units and groups of experts from national customs and tax administrations and trade organisations to develop electronic training materials on tax and customs topics of common interests from a European point of view.

Currently, DG TAXUD has three types of eLearning courses:

A. Standard eLearning courses (Reference training: eAEO-2, downloadable from the [Europa website - AEO eLearning](#).

B. IT application eLearning courses (usually eLearning format based on the 'Tell me, Show me, Try me, Test me' concept)

C. Performance simulation eLearning course (Ex: multi-path learning or 3D scenarios; reference training: eDPC, extract available in Annex 18)

When designing and developing eLearning solutions, particular consideration must be given to the specific context within which EU eLearning is provided:

*   The content is produced centrally while training implementation takes place in dispersed locations throughout the EU and abroad.

*   All training content is subject to extensive translation [7]

*   Learners are numerous, diverse and dispersed.

*   Our clients differ in training priorities and policies, training methods and administrational, organisational and infrastructural arrangements.

*   Content needs to be easily adaptable in order to ensure the content remains up to date with changing references, legislation or professional practices.

*   Some eLearning courses contain sensitive information, consequently its distribution is limited and the content needs to be secured.

Key requirements set for EU eLearning development are further outlined in section 6.3 .

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[7]   eLearning courses may be translated into the national languages of the Participating Countries. Currently, these are the 28 EU Member States and Albania, former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey.

4.1.2.1 Current eLearning development Process

DG TAXUD consults TAXUD policy services and EU participating countries and proposes the yearly work programme containing planned learning content subjects. Each eLearning project is initiated and organised by DG TAXUD during the *Set Up phase* of a project.
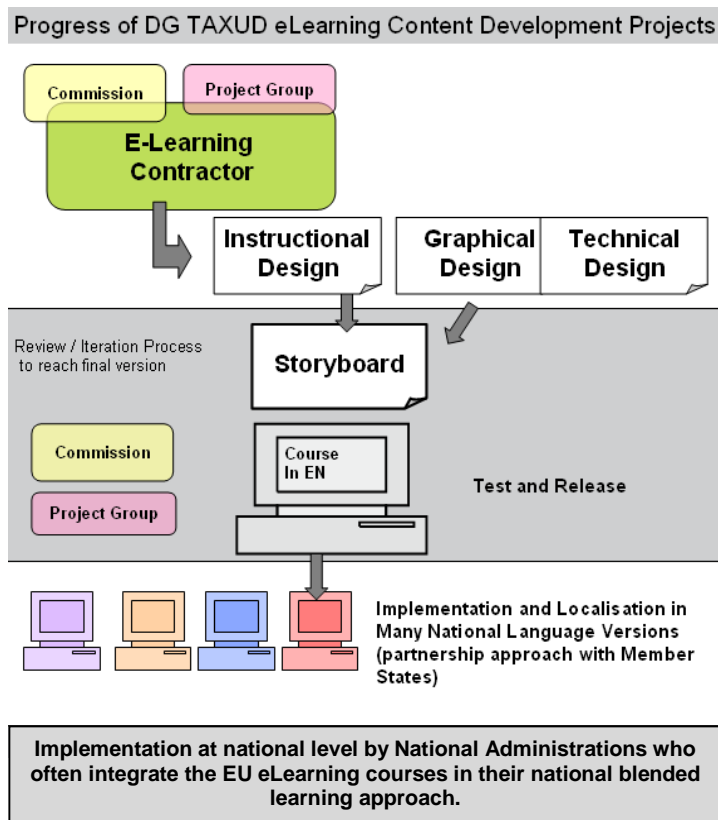
4.1.2.2 eLearning Content Creation Process

The contractor and CTT work closely with selected Subject Matter Experts (SMEs) in order to define the general architecture of the future training course. Once the architecture is validated, the *Detailed Design phase* starts. Then, the contractor writes the storyboards and collects all necessary source material, which will be needed during the *Development phase*.

The *Development phase* can be launched, after the storyboards are validated and accepted. Then, the contractor starts the development of the course in the current source language (English), producing all the media needed, making customised development as necessary and agreed, integrating the media and customised development into a learning content and makes final adjustments and testing and provision of the content for validation by the CTT.

Deliverables include graphical media (source files and integration-ready files), off-line-generated or recorded speech (English), e-learning source files, SCORM compliant English course and CD/DVD version, installation manual and Demo CD/DVD.

EU eLearning content is currently produced by using the authoring tool SmartBuilder, (licence-based). A limited number of less recent EU eLearning courses are built with other authoring tools (eg. Atelier-built courses or flash based courses, produced by

LINE or KINEO). The list of the current EU eLearning portfolio with corresponding authoring tool (state of play February 2015) is documented in section 6.1.

The EU context, within which EU eLearning courses are designed and developed, requires particular attention in terms of

- **intensive cooperation with designated national topic experts (SMEs)**, a process that needs to be thoroughly coordinated, managed and planned by the contractor. In particular during the content creation phase, intense involvement of the SMEs, who contribute with their expertise to the project, is required, and this in form of physical working meetings (project group meetings) as well as through well-managed on-line collaboration via PICS (TAXUD/PC on-line collaboration tool);

- use of **agile design and development methods and processes**, which allow to either progress on various sub-aspects of the eLearning topic in parallel or to allow limited retrospective content design amendments, in line with policy developments or adaptation needs, if required;

- **pedagogically meaningful use of voice** in eLearning courses, with regard to quantity of voice used, quality of voice as well as added value provided through use of voice. The voice-related work impact on localisation projects (translation into other EU languages) and on updating projects requires thorough consideration in this context.

Once a 'stable' English master version of the learning content is completed, the Localisation phase can start.

4.1.2.3 Localisation & Maintenance

The **efficient localisation** (language translations) **is a key issue** of centrally produced learning content, as there are currently more than 30 participating countries (representing today 24 EU languages + further third country languages) acting as clients.

The process of localisation starts with a formal partnership agreement between the European Commission and the beneficiary participating countries. Participating countries are responsible for the provision of text translations and the related quality assurance. The contractor manages the localisation processes in collaboration with the CTT and provides for the voice recording whenever required.

These arrangements are currently supported by a localisation server, XTM -, where content and translations can be produced and assessed on-line. The localisation server provides access mechanisms for localisation objects, services to extract, export and import text segments, XLIFF-files and/or Excel-format translation files, and to work on the course content frames directly handling translations. In addition the translation server is required to support an offline (eg Excel) translation process to support certain MS who prefer to work offline. The usual reference standard format for exchange of localisation files is XLIFF (XML Localisation Interchange File Format)[8].

TAXUD is interested in establishing an efficient maintenance strategy for centrally developed eLearning, given that the continuously growing EU eLearning portfolio requires it. The current maintenance approach is not standardised and largely dependent on CTT monitoring of political developments and case-by-case indications of correcting needs by users.

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[8]   XLIFF was standardised by OASIS in 2002.

4.1.3 European Competency Framework and Common Higher Education Programmes[9]

The European Competency Framework has been developed for Customs. Further efforts, in cooperation with the contractor, will focus on making it operational in the National Administrations and the private sector and ensuring its content remains up to date.

For more information please see under point 4.1.1 (and the referenced information source on EUROPA). A detailed explanatory brochure on the EU CFW initiative, its context, its wider impact and its support role with regard to 'Modernisation of Customs in the EU', is attached as Annex 13.

In contrast, for Taxation, a light version of a European Competency Framework may need to be built (as soon as political agreement is reached), following the prior realisation of an EU-wide study on Taxation training and performance building in the EU. Once developed, support to make it operational throughout the Union will be required as well as updating and maintenance schemes.

The European-wide operationalization of competency-based vocational and academic training programmes for Customs (developed in 2014/2015) and EU recognition process support for CFW compliant training programmes (developed in 2014/2015) will require further support under this new FWC.

Leadership development for customs and tax leaders of the EU is a further area, where appropriate competency development concepts (developed in 2015) need to be put in place and be appropriately rolled-out through the Union.

Further follow-up projects, such as a potential extension of common customs training reference programmes into the field of taxation may be required in the near future.

4.2 NEW NEEDS & CHALLENGES TO RESPOND TO

In addition, this new framework contract, B-Train 3, needs to address newly identified or known upcoming challenges, that **need to be addressed under this call for tenders and be thoroughly reflected in the offer**.

4.2.1 eLearning course development innovations

New modern training technologies have to be adopted to complement the eLearning courses in order to reach out to the new generation of officers.

Potential examples are to provide the possibility to learn through mobile devices (smartphone and tablets, apps, ebooks, mobile html, …) and to further increase interactivity through gaming or other immersive simulations.

Furthermore, the potential of a 'decentralised' training content development (decentralised = under the lead of a national administration), contrary or complementary to the current 'common' training content development (common = under the lead of the DG TAXUD/CTT) could lead to a considerable increase of EU learning products.

Optional realisation concepts and processes would need to be developed under this FWC including realistic implementation support scenarios.

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[9] The provision of this type of contractual service support is usually fully or partly addressed in form of 'consultancy days' (WP. 3).

4.2.2 European Learning Management Environment – vision project

Beyond the Dublin Strategy and Initiative, a new 2016-2020 vision is being proposed to encompass all components of the Dublin Strategy and the Dublin Initiative into an EU-wide Learning Management Environment.

More first thoughts about this concept are available in the extract of the 'Performance Development Framework Vision for the Customs and Taxation Profession (2016-2020)' (see Annex 14). The contractor should bear in mind that this vision document is still a Non-Paper for discussion at this moment.

The contractor should however be prepared to design, develop and deploy such a solution if agreed at European level.

4.2.3 Internal and External Communication

Support provided under this new FWC, will also have to cover additional services or product provisions related to internal and external communication policy of DG TAXUD on customs and tax issues

The objective of communicating taxation and customs is to:
- raise awareness of European tax and customs policies by presenting and explaining them clearly, outlining their benefits and providing practical background information in a timely manner;

- present and explain the 'added value' of Commission policies, initiatives and services in general and where appropriate their interaction with taxation and customs policies;

- encourage dialogue via consultations, interactive services such as data bases and news service, etc; and

- develop internal communication within the DG.

DG TAXUD makes use of a variety of different tools in the planning, organisation and implementation of its communication activities, amongst others: press and media (including new emerging media), external networks, websites, newsletters, communication campaigns, audio-visuals, publications and events. For examples of typical TAXUD communication measures see section 4.4 - Reference Documents.

The contractor must be prepared to provide professional communication expertise to these and similar TAXUD communication initiatives.

4.3 ESTIMATED SERVICE REQUIREMENTS / YEAR (WORKLOAD)

- The average service requirement, that is expected to be requested under this FWC per year, is estimated as follows: eLearning development projects: up to 20 modules of 1 hour/year in 5-6 topic areas;

- eLearning localisation projects: translation of the developed EN master eLearning modules into up to 22 EU languages (usual average number of translations requested per module: 5-15)

- Consultancy provision:
  - o 1-2 EU studies/year
  - o 3-4 Country specific training support initiatives/year (eg. support to national administrations with the national implementation of the EU CFW or similar);

- ad-hoc support for 5-10 EU training projects, representing in average a consultancy effort of 50 – 150 person-days/each;

- EU Communication:
  - about 1 – 2 larger-scale EU Communication campaigns/year, each composed of a series of topic-based communication measures (eg. see reference cases under point 4.4)
  - up to 15 smaller-scale communication projects/year (eg. brochures/leaflets/web publication etc)

The provided figures are purely indicative and meant to provide guidance with regard to the tenderer's calculation of the required work effort. This quantitative service requirement estimation is by no means binding for the Commission.

4.4 REFERENCE DOCUMENTS

EU Multifaceted Training Programme

- Dublin Strategy: see Annex 11

- Dublin Initiative: see Annex 12

- Extract Non-Paper Performance Development Framework Vision for the Customs and Taxation Profession (2016-2020): see Annex 14

- eLearning: Europa website - eLearning

- Example standard eLearning: Europa website - eAEO2

- Example Performance simulation (3D) eLearning: Sample of 3D based immersive learning module – eDPC, see Annex 18

- Customs Competency Framework :
  - Europa website - CFW
  - Circabc
  - Brochure 'Modernising Customs through competency-based human resource management.' (see Annex 13)

Communication:

- The DG TAXUD website
- Cash controls web section and information material
- One minute video - What the EU Customs Union does in a minute
- Tax fraud and tax evasion web section
- Tax fraud and tax evasion video

5 TASKS AND DELIVERABLES

In order to achieve the above mentioned B-Train 3 specifications, the contractor is required to fulfil the following tasks. They are organised in Work Packages (WP). The implementation of these tasks is demonstrated through the provision of the corresponding deliverables (D) which will be ordered, charged and accepted according to a specific mechanism. The order and acceptance mechanism is described in section 8.2, the corresponding cost calculation is reflected in the Price Table (Annex 3), and the quality assessment is defined in Quality Plans (see also section 7).

With reference to Article II.14 – Checks and audits of the FWC, the contractor must keep full documentary trail of its activities in addition to the required deliverables. The contractor must provide immediate access to those files in a structured way if required.

Tasks	Deliverables	Pricing	Order
WP 1 CONTRACT AND PROJECT MANAGEMENT			
WP 1.1 Take Over			
The contractor takes over the legacy products from the previous FWC BT2 (acknowledging that some products still derive from FWC BT1). The current inventory is listed in section 6.1 (state of play February 2015) and will be extended with the services delivered in 2015-2016 under the current FWC BT2. Beside the material take-over, the contractor is required to effectively train and commit to ensure the business continuity for all legacy deliverables and services. Consequently, the contractor may be requested to maintain, update or localise deliverables developed under the former FWCs.	**D 1.1–1 Migration** • Migration plan, including procurement and capacity building, will be provided within the first month of the FWC. • Migration of the digital repository from the previous contractor as detailed in section 6.1. **D 1.1-2 Infrastructure** Purchase and set-up of appropriate servers, hardware and software licenses in order to take over and continue the provision of the existing services according to the agreed migration plan (see D 1.1-1). **D 1.1-3 Capacity Building** Trained team able to provide all contracted services and deliverables.	T1	SC
WP 1.2 Hand Over			
At the termination of this FWC, the contractor drafts a handover file for the attention of the next contractor. The contractor provides detailed inventory, documentation and training sessions for explanation of the information, documentation, organisation and access and handling of the content of digital repositories and media concerning all deliverables to be handed over under BT3, including IT hardware, IT systems and services, IT software tools, IT applications and e-learning content	**D 1.2-1 Hand-over documentation** • Detailed inventory • All hand-over documentation, source code, licences, infrastructure; **D 1.2-2 Hand-over plan** • Hand-over plan for handing over the activities, the documentation and knowledge and ensure a smooth transfer; **D 1.2-3 Hand-over knowledge transfer**	T2	SC

Tasks	Deliverables	Pricing	Order
	• Training and support to a third party designated by DG TAXUD.		

WP 1.3	Portfolio/Project management		

Tasks	Deliverables	Pricing	Order
The contractor will have the responsibility of setting up the organisation, resources and necessary infrastructure for the provision of the contract activities. The contractor's Portfolio Manager will act as the contact point between the contractor and the Commission and will be responsible for the overall execution and performance of the contract. This includes also contacts and coordination with other contractors whenever requested by the CTT, who can call for ad-hoc meetings with 1 working day notice. The requested portfolio/project management activities include the following. (1) Establish and maintain the FQP and SQP (also referred to as Quality Plans); (2) Produce offers for SC and proposals for RfA; (3) Perform internal Quality Assurance and Quality Control activities; (4) Perform Risk management; (5) Coordinate with the CTT on a regular basis by holding monthly bilateral meetings and ad-hoc meetings; (6) Set the agenda and draft the minutes of the meetings; (7) Report on a monthly basis (MPR); (8) Maintain a detailed planning of all the deliverables, activities and services required to fulfil the contractual obligations (DTM); (9) Set-up and maintain an on-line collaborative support facilities for the portfolio and project management tasks related to this FWC; (10) Keep track of its activity planning on a real-time basis and provide DG TAXUD on-line access to this real-time data; (11) Maintain and update on a day-to-day basis a repository containing all items developed under BT3; (12) Cooperate with the Commission during a quality and security audit; (13) Manage procurement of necessary products and services; (14) Provide Library management function of supporting the maintenance and access services of depository of e-learning contents; (15) Keep the applicable process and procedures documentations up to date and integrate the lessons learnt; (16) Take full project management ownership in line with internationally	**D 1.3-1** **On-line collaboration tool** The systems must ensure the confidentiality of the on-line content and allow restricted access only to DG TAXUD stakeholders or any party nominated by DG TAXUD. It provides on a 24/7 (7 days a week, round-the-clock) basis : • Access to contractor's real-time planning file • A web conferencing system with the possibility to exchange and access working documents • An on-line collaborative environment to author documents • An on-line file repository for the delivery and storage of files • A web forum for project management related discussions • All BT3, related records, documents and plans • This list may alter in function of negotiations and changes in administrative procedures. **D 1.3-2** **Monthly Progress Report (MPR)** The contractor will report the contractual status for completed, ongoing and planned projects/activities on a monthly basis through a MPR. The requirements for the MPR are detailed in FQP and might be further complemented through related SQP. **D 1.3-3** **Quality Plans: Framework Quality Plan (FQP) and Specific Quality Plans (SQP)** The contractor will further develop the FQP and issue the SQP in agreement with TAXUD. (see also section 7) **D 1.3-4** **Delivery Tracking Matrix (DTM)** The contractor will keep track of all due deliverables to be produced or serviced in the DTM. The DTM includes the deliverable data, delivery dates, and acceptance mechanisms as well as dedicated SQI's. (see also sections 7 and 8) **D 1.3-5** **Project management monitoring tools** In general, DG TAXUD requires real-time access to all project management monitoring tools as detailed above. The frequency of the reporting will be defined at the start of the project and will likely vary over the duration of the project.	T3	SC RfA

Tasks	Deliverables	Pricing	Order
accepted Project Management standards from project initiation till project closure in order to deliver timely and qualitative solutions for activities corresponding to the general accepted definitions of 'project';	The reporting is timely and adequate.		
	D 1.3-6 *Project closure documentation*		
(17) At the end of each project, the contractor will issue a hand-over file and a project evaluation report focusing on the quality parameters and lessons learnt;	<u>The evaluation report</u>, including lessons learnt, is timely, well-structured, clear, concise, complete and accurate. <u>Hand-over file.</u> The requirements for the hand-over file will be defined project per project. <u>Dissemination of final deliverable</u> The final project product is disseminated according to the project agreement (on PICS, intranet, memory stick, hardcopies, …)		
(18) **All the items produced as a project are covered by a guarantee for a period of 18 month after acceptance**. During this period all the activities related to corrective maintenance shall be executed free of charge. The contractor shall therefore foresee a post-implementation issue log.			
	D 1.3-7 *Post-implementation incident logfile*		
	Once a project has been handed-over, a guarantee period of 18 months starts to run. As from then onwards, a post-implementation log-file is maintained on a weekly basis until all logged issues are resolved.		
	D 1.3-8 *Other documentation*		
	• Offers, SfR and SfA are submitted timely. They are accurate, clear, complete and concise. • The meeting minutes are timely, accurate, clear, complete and concise. • Purchase of hardware, software, media, etc …. • This list may alter in function of negotiations and changes in administrative procedures.		

WP 2 DEVELOPMENT, LOCALISATION, UPDATE, MAINTENANCE AND DISSEMINATION OF E-LEARNING COURSES AND OTHER ELEARNING SOLUTIONS

WP 2.1   Development of new eLearning courses

This Work Package covers the activities as described and defined in these Tendering Specifications for the production of eLearning content, typically a Centrally Developed Training Course.	Project management: See WP 1.3	T3	RfA
	D 2.1-1 *Set-up and generic course development Common requirements*	T4	
The development process for such eLearning courses include in general the scoping of the eL project, the production of Instructional Design Specifications, Storyboards, graphical and technical design specifications, technical course developments, multi-media production, voice integration (if ordered under WP 3), assembling and packaging of courses, production of master CDs/DVDs & design of cover layouts as well as thorough testing and quality controls. The management of content material gathering processes	'Set up and generic course development' represents a one-off investment at the beginning of the eLearning course development and includes elements such as the menu development, visual design, user interface development and introductions, development of frequently used elements throughout the course (eg. repetitive templates and presentation design) and other comparable course horizontal elements.		

Tasks	Deliverables	Pricing	Order
and/or moderation of meetings with SME's form part of this WP. The normal expectation is that central learning content is developed in one master language (usually in English) and excellent knowledge of the master language is required by the contractors' staff involved in content related development tasks. Mission costs are included for meetings taking place in Brussels.	'Set up and generic development' is not supposed to appear for add-on courses of already existing courses or for new courses, for which already existing design elements and/or development objects are re-used The related specific and quality requirements are detailed in section 6.3. Deviations from this list may occur on specific request from DG TAXUD.		
All the items produced under this work package are covered by a guarantee for a period of 18 month after acceptance. During this period all the activities related to corrective maintenance shall be executed free of charge. The current eLearning process is documented in Annex 15. The processes define the roles, responsibilities and tasks from each stakeholder in this process. The processes may be updated for process optimisation purposes and consequently alter tasks and deliverables as part of the technical offer. The closure of the project includes the dissemination through DG TAXUD's on-line collaboration tool, unless specified otherwise, and the technical support to the related stakeholders with regard to use technicalities. The used LMS systems for which support may be required are listed in section 6.2. A period of 18 months will be foreseen for bug fixing errors detected after release. Contractor must be able to handle simultaneously: • 3 development projects • up to 25 localisation projects	*D 2.1-2* *Development documentation*	T5- T7	
	Process specific deliverables are defined in the eLearning and localisation processes (Annex 15 and Annex 16). The processes may be updated for process optimisation purposes and thus alter the requirements of the *eLearning Development documentation* deliverables. Included under these deliverables are (not exhaustive): • minutes of project group meetings • animating project groups on PICS to keep the project group alive and harvest the experts' contribution • storyboard • test version • pilot version • demo version • …		
	D 2.1-3 *Core eLearning course*		
	Specific Requirements for standard, IT application or performance simulation (3D) eLearning courses with a design complexity D1, D2 or D3. The related specific and quality requirements are detailed in section 6.3. Deviations from this list may occur on specific request from DG TAXUD.		
	D 2.1-4 *Voice-over*	T8-T9	
	Recording of voice-over text in professional studio quality, performed by a trained, professional human native speaker or the production of advanced, fine-tuned electronically generated speech The related specific and quality requirements are detailed in section 6.3.		
WP 2.2 **Development of new eLearning formats (apps, ebooks, webinars, and similar)**			
Specifications will be in line with the specifications of the eLearning courses if	*D 2.2-1* *New eLearning format*	T3-T9	RfA

Tasks	Deliverables	Pricing	Order
applicable. Further specifications will be adopted in due course when new eLearning formats will be applied. **All the items produced under this work package are covered by a guarantee for a period of 18 month after acceptance**. During this period all the activities related to corrective maintenance shall be executed free of charge.	The deliverables related to this WP will follow the same logic and requirements as for WP 2.1 – 'development of new eLearning courses'. The specifications may be adapted in common agreement according to the characteristics of the new format if needed.		
WP 2.3 Localisation of eLearning solutions (courses, apps, ebooks, webinars, …)			
Localisation means translation (written and oral) and related adaptation of the eLearning courses. eLearning courses may in general be translated into the national languages of the Participating Countries. Currently, these are the 28 EU Member States and Albania, Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey (state of play Jan. 2015) Other language localisation needs may occur in the future. **All the items produced under this work package are covered by a guarantee for a period of 18 month after acceptance**. During this period all the activities related to corrective maintenance shall be executed free of charge.	Project management: See WP 1.3	T3	RfA
	Text translation into EU language / any other language: See WP 4.1	T16-T17	
	Technical Integration of the Translation: see WP 3.2 Technical integration of translated text and produced voice-over into another deliverable, most commonly a training course.	T14	
	D 2.3-1 Voice-over	T10-T12	
	Recording of voice-over - EU language, any other language -human voice or electronically generated speech Recording of voice-over text in professional studio quality, performed by a trained, professional human native speaker or the production of advanced, fine-tuned electronically generated speech The related specific and quality requirements are detailed in section 6.3		
WP 2.4 Corrective maintenance eLearning solutions (courses, apps, ebooks, webinars, …)			
The FWC distinguishes two types of maintenances on the delivered products: Evolutive and Corrective. Corrective Maintenance is guaranteed for 18 months on each delivered product as of its SfA delivery date. High quality of delivered products is ensured by a full support in case of anomalies and bugs caused by B-Train 3 Development team (BT3 Dev). Whenever an issue is logged, BT3 Dev will determine its severity, agree on the level of priority and propose a resolution plan to DG TAXUD (Corrective Maintenance).	*D 2.4-1 Corrective maintenance* Corrective maintenance is implemented and disseminated in line with the above standards. The qualitative delivery of this WP may have an impact on prior agreed quality level of the related product (see FQP).	Free of charge for the the first 18 months Afterwards T13-T15	SC
WP 2.5 Evolutive maintenance eLearning solutions (courses, apps, ebooks, webinars, …)			
Evolutive maintenance covers mainly the management of changes. It will be managed on a case by case mode and will function of its own plan and	*D 2.5-1 Evolutive maintenance* Evolutive maintenance is executed and disseminated in line with the above	T13-T15	RfA

Tasks	Deliverables	Pricing	Order
budget (RfE and RfA process).	standards.		
Issues due to bugs on other deliveries than BT3 development ones or on adapted contents by Participating Countries will be considered as change requests. B-Train 3 Dev will propose a resolution plan to DG TAXUD and DG TAXUD will evaluate what is the best approach, given the proposed planning and budget constraints. (Evolutive Maintenance)			
The same process will be applied in case of pure change request (Evolutive Maintenance)			
Evolutive Maintenance that requires a call for SMEs will be handled under WP 2.1. Consequently, the updated deliverable will be considered as a BT3 development.			

WP 3 CONSULTING AND SERVICE DELIVERY IN CAPACITY BUILDING AND DEPLOYMENT OF THE MULTIFACETED TRAINING SUPPORT PROGRAMME

WP 3.1   Consulting services –Expert Profile 1 (P1), Expert Consultant

Tasks	Deliverables	Pricing	Order
P1-consulting services may include on demand services, such as or equivalent to: (1) Provide high profile moderation and management support for group meetings and events (other than related to the eLearning content development process under WP.2); (2) Provide consulting services on innovative solutions; (3) Provide high profile consulting in change management; (4) Lead high profile promotional events related to the multifaceted training support programme for the Union. (5) Lead special audits, inspections, reviews and benchmarks at National Administrations; (6) Trouble-shoot problems that could not be resolved by 1st and 2nd line Helpdesk. (7) Provide equivalent and other on demand support services (P1) as specified in these Tendering Specifications.	**D 3.1-1 P1 Consulting** Provision of the consulting services as detailed in WP 3.1, WP 3.2 and WP 3.3. The deliverables will be defined at the start of each consulting project or request. Drafts, submitted for approval, shall be timely, well-structured, clear and concise. The added-value is recognised and relevant. They are drafted in native English free of spelling errors. The style is adapted to the target audience. The final document is in addition complete and accurate with proven added-value.	T13	On Demand / RfA

WP 3.2   Consulting and services – Expert Profile 2 (P2), Consultant

Tasks	Deliverables	Pricing	Order
P2-consulting services may include on demand services, such as or equivalent to: (1) Design, develop and deploy technical solutions required for the EU common training strategy, such as for example the EU-wide Learning Management Environment (if approved);	**D 3.2-1 P2 Consulting** See 3.1-1	T14	On Demand / RfA

Tasks	Deliverables	Pricing	Order
(2) Provide operational integration of new technical solutions and working methods. (3) Perform setting up, administration and/or moderation of on-line environments and/or other services and processes as needed for realisation of this FWC. (4) Perform ad-hoc specifications, up-dating and maintenance developments and services for common eLearning courses (localisation and maintenance) (5) Provide 2nd line Helpdesk services (6) Provide equivalent and other on demand support services (P2) as specified in these Tendering Specifications.			

WP 3.3	Consulting and services – Expert Profile 3 (P3), Junior Consultant		
P3-consulting services may include on demand services, such as or equivalent to: (1) Perform feasibility studies and research; run studies on different e-learning solutions, web 2.0 functionalities etc. (2) Provide support, organise, attend and/or assist as moderator for training activities, workshops and demonstrations (other than related to the eLearning content development process under WP.2); (3) Provide demo versions and other promotional material for common eLearning courses. (4) Participate in special audits, inspections, reviews and benchmarks. (5) Provide 1st line Helpdesk services (6) Provide equivalent and other on demand support services (P3) as specified in these Tendering Specifications.	**D 3.3-1** **P3 Consulting services** See 3.1-1	T15	On Demand / RfA

WP 4 PROVISION FOR TECHNICAL INFRASTRUCTURE, PRODUCTS AND SERVICES

WP 4.1	Translation		
Translation activities for all initiatives covered by these Tendering Specifications are covered by this WP. The activities to integrate and to produce the corresponding translated versions for localisation of eLearning courses remain under the respective WP 3.2.	**D 4.1-1** **Translation EU national language**	T16	RfA
	Translation from English in another EU national language or vice-versa, native level, free from spelling and grammatical errors. The related specific and quality requirements are detailed in section 6.3		
	D 4.1-2 **Translation other language**	T17	RfA

Tasks	Deliverables		Pricing	Order
	Translation from English into any other language or vice-versa; native level, free from spelling and grammatical errors. The related specific and quality requirements are detailed in section 6.3			
WP 4.2 *Meeting infrastructure*				
The contractor will provide meeting infrastructures on request from DG TAXUD.	**D 4.2-1**	**Meeting room**		On demand
	Meeting infrastructures request from DG TAXUD may be of the following composition:			
	• Meeting room with internet access and beamer for up to 15 participants		T18	
	• Meeting room with internet access and beamer for up to 30 participants		T19	
	• Meeting room equipped with PCs for each participant and internet access - 10 participants		T20	
	• Meeting room equipped with PCs for each participant and internet access - 20 participants		T21	
WP 4.3 *Procurement of other technical infrastructure, products and services*				
The procurement of technical infrastructure, products and services required for the fulfilment of this FWC. This includes in particular the development of a future Learning Environment (see section 4.2.2)	**D 4.3-1**	**Procured item**	T26 (reimburs ement on the basis of the third party supplier's invoice and T13-T15 where appropria te)	On demand
	The Commission will be the owner of all products acquired by the contractor under this WP. For software and other products (eg photo and video material) the licence shall be fully transferable to the Commission including all rights for future usage. See also section 6.4.			
WP 4.4 *Service Support and Delivery*				
This work package covers the on-demand provision of **necessary support services** related to servers, web server software applications, and other necessary IT infrastructure, database, IT-products and other e-content development tool products, communication systems, maintenance services, access management, backup management and similar support services as needed for BT3 purposes to provide fully functional servers and processes as described in these Tendering Specifications. Notably, this may include the on demand provision of support services related to digital object repository server, on-line server for content development, on-line server for learning	**D 4.4-1**	**Service support and delivery**	T26 (T13-T15 and reimburs ement of third party supplier's invoice where	SC RfA
	As defined by the related SC and RfA. See also section 6.4.			

Tasks	Deliverables	Pricing	Order
content localisation and maintenance and on-line server for distribution of completed modules and sub-modules of learning content (also incl. CD/DVD duplications and dissemination and similar support tasks related to learning content publication) as well as necessary similar services for PICS and future collaborative platforms.		appropria te)	
Hosting of BT3 related IT software and hardware products, applications and systems plus provision of Helpdesk for reporting unscheduled problems, troubleshooting services and service call tracking, quality management and reporting of hosted software and hardware product availability and reporting of service availability and quality is as well covered by this work package.			
This work package covers the **maintenance** of software and hardware products and the related provision of Helpdesk services, eg. for reporting unscheduled problems, troubleshooting services and service call tracking, Quality management and reporting of software and hardware product availability and reporting of service availability and quality.			
The Commission may request the contractor to extend these services to third parties, as necessary. The contractor will have to implement such request without unnecessary delay.			
Services and other support tasks under BT3 may be purchased via the provisions for services and other support tasks that are included in a Specific Contract. In this case, the budget is used by issuing RfEs/RfAs (as for provision for on-demand work). The price the Commission will pay for the ordered services and support tasks will be at cost calculated in line with the BT3 "Consultancy and services – Expert Profiles 1, 2 and 3" as specified under WP 3.1 – 3.2 – 3.3 (P1, P2 and P3).			
WP 5 INTERNAL AND EXTERNAL COMMUNICATION CONSULTANCY AND DELIVERY			
WP 5.1 Communication Consultancy – Category 1			
Category 1 communication consulting services cover service performed by or equivalent to: - Media expert (including new media) - Communication expert - Journalist/editor/writer - Film Director - or equivalent	**D 5.1 -1 Communication Services Category 1** Services provided by Category 1 communication consultants.	T23	RfA
WP 5.2 Communication Consultancy – Category 2			
Category 2 communication consulting services cover services performed by	**D 5.2 -1 Communication Services Category 2**	T24	RfA

Tasks	Deliverables	Pricing	Order
or equivalent to: - Cameraman - Photographer - IT Technician - Graphic artist - Actor - Web designer/developer - or equivalent	Services provided by Category 2 communication consultants.		
WP 5.3 Communication Consultancy – Category 3			
Category 3 communication consulting services cover service performed by or equivalent to: - Make-up artist - Manual technician - Hostess and steward - Communication assistant - or equivalent	**D 5.3 -1 Communication Services Category 3** Services provided by Category 3 communication consultants.	T25	RfA
WP 5.4 Procurement of technical infrastructure, products and services in the field of communication			
The contractor will provide a fully-fledged service and support on request from DG TAXUD in the field of internal and external communication. This includes amongst others: - organisation of a venue for an event, including accommodation and travel arrangements for participants; - research and reservation of a restaurant; - research and renting of technical equipment; - renting of vehicles; - provision of gadgets; - provision of participants' kit; - printing (including monitoring and follow-up of the printing process) or documentation and publications, invitations, post-cards, folders, posters and other visual material in quadrichromie; - distribution of above purchased or produced material; - or equivalent and other on demand communication support services as specified in this Tendering Specifications.	**D 5.4 -1 Communication infrastructure, products and services** Every service should be closed with a final technical report within 30 days of the final day of the work undertaken.	T27 (reimbursement of third party supplier's invoice and T13-T15 where appropriate)	On Demand and RfA

Tasks	Deliverables	Pricing	Order
WP 6 MISSIONS AND TRAVEL PROVISION			
WP 6.1 Missions and Travel			
The contractor may be requested by DG TAXUD to travel abroad. In this case travel expenses can be submitted in compliance to Article I.3.5 – Travel and Subsistence Expenses of the model framework contract. This does however not apply for 'meetings at Commission Premises', which include meetings held within a maximum distance of 50 km from these premises in Brussels. Travel costs occurring in connection to the BT3 management and to the production of an e-learning course are part of the budget for the related work package under WP.1 and WP.2, unless otherwise mutually agreed. See also sections 8.8 and 8.9.	***D 6.1-1 Expenses reimbursement request*** The conditions for the reimbursement of travel expenses are established by Article I.3.5 – Travel and Subsistence Expenses of the model framework contract.	T28	On demand

6 OPERATIONAL SPECIFICATIONS

6.1 INVENTORY OF LEGACY PRODUCTS

State of play as of February 2015

Course	Description	Status Feb 2015	Duration	Dev tools
Car Search	Perform a car rummage in a structured and safe way, using the appropriate tools and techniques	Off-line version + LMS version in EN, FR, DE	5 hrs	Flash, Dreamweaver, Illustrator, PaintShop Pro
Container Examination	Search containers in a safe and consistent way	Via CD, Intranet or LMS in EN, DE, FR, (SE, SI, NL, PT, MK)	6 hours	Atelier
AEO	Authorised Economic Operators – What is AEO, how to apply, and how Customs processes the application.	Via CD, Intranet or LMS in EN, GR, BG, ES, PL, PT, SK, CS	5 hrs	Smartbuilder I
Simplified Procedures and SASP	Single Authorisation for Simplified Procedures – both customs and economic operators training needs regarding SP & SASP application procedures	Via CD, Intranet or LMS in ES, HU, PT, SK	3 hrs	Smartbuilder I
VAT Learning programme	Basic concepts of the EC VAT System Directive currently transformed in 13 modules.	Via CD, Intranet or LMS in EN (localisations to be confirmed and planned in 2015)	15-30 min each	Smartbuilder I
EORI	Information course on the 'Economic Operators Registration and Identification numbers' concept	Via CD, Intranet or LMS in EE, EN, HU, MK, RO, SK, (BG, DE, GR, IT, LT)	30 mins	Flash
Drug precursors – Customs (eDPC-C)	Basic training in combination with 3D simulation of different customs environments for learner to try out acquired skills in relation to understanding the importance of Drug precursor control, implementation of the proper control procedures and the awareness of routes and to the traffic related risk factors	Via DVD, Intranet or LMS in EN Update is planned in 2015	6 hrs	Atelier + 3D simulation tool
Drug precursors – Economic operators (eDPC-EO)	Support the implementation of Drug Precursors guidelines in the industry, create awareness of suspicious transactions and to know how to react to these suspicions in collaboration with the competent authorities	Via CD, Intranet or LMS in EN, (BG, DE, ES, FR, GR, HU, LT, MK, NL, PT, SK) Update is planned in 2015	2.5 hrs	Atelier
VAT fraud	Administrative cooperation between MS administrations in the field of VAT fraud	Via CD, Intranet or LMS in EN	2 hrs	Flash
EOS	IT training on the EOS application as provided by TAXUD to the MS	Via CD, Intranet or LMS in EN	2 hrs	Captivate and authoring tool Flash Content Framework
EMCS Core Module	The course is designed to help newcomers in the trading in excise goods to quickly and easily find what they need to know when they start using	Via CD, Intranet or LMS in EN, (BG, CZ, LV, MK, PL, RO)		

Course	Description	Status Feb 2015	Duration	Dev tools
	EMCS. It provides information about what data is held and how it can be retrieved.			
EMCS II	*This module presents the main functionalities of EMCS, i.e submission and receipt of an e-AD, export functionalities, administrative cooperation functionalities and also management of registration and reference data.*	*Via CD, Intranet or LMS in EN, (HU, PL)*	*8 hrs*	??
BPM	*Business Process Modelling Explained*	Via CD, Intranet or LMS in EN		Smartbuilder I
eFDT (Electronic Forms)	*How Member States use the electronic forms system to exchange information relating to direct taxation.*	Via CD, Intranet or LMS in EN, ES, DE, HU, PL	*4.5 Hrs*	Smartbuilder I
SAMANCTA	*How to use the SAMANCTA on-line database in support of Customs sample taking*	Via CD, Intranet or LMS in EN, CS, ET, PT, HR, ES, NL, HU, LT, LV	*1.5 hr*	Smartbuilder I
IPR	*An explanation of Intellectual Property rules and regulations as pertains to Customs, including enforcement guidelines and processes.*	Via CD, Intranet or LMS in EN, BG, CS, ET, ES, FR, HR, HU, LT, LV, MK, PL, PT, SK	*1 hr*	Smartbuilder I
CRMS	*How to use the Customs Risk Management System to create and exchange quality risk information relating to Customs.*	Via CD, Intranet or LMS in EN	*3.5 hrs*	Smartbuilder I, Storyline (for appsims)
Licences				
Smartbuilder	Smartbuilder I, a server-based eLearning tool that outputs to Flash			
XTM	A Translations Management server with import/export features for Smartbuilder and other tools used in dev.			

The inventory will be completed with the deliverables produced after February 2015 under the current BT2 FWC. The additional deliverables are an integral part of the legacy deliverables to be taken-over by the BT3 Contractor.

6.2 CURRENT LMS IN USE BY THE NATIONAL ADMINISTRATIONS

Status Dec. 2014

Participating Countries	LMS (type/version)	Browser (type/version)
ALBANIA	Unknown	Unknown
AUSTRIA	IBM SABA (modified and adapted)	MS Internet Explorer 9
BELGIUM		
BULGARIA	IBM Learning Accelerator for WebSphere portal 6.0.1	MS Internet Explorer 6.0+
CZECH REPUBLIC-Customs	Moodle 1.9.9+	MS Internet Explorer 10
CROATIA	Moodle	Ms Internet Explorer 7
CYPRUS	No	Internet Explorer 9
DENMARK	IBM SABA (basis for a cross-governmental LMS)	Internet Explorer 8.0 (10.0 available)
ESTONIA		
FINLAND	Moodle	IE9
FORMER YUGOSLAV REPUBLIC OF MACEDONIA	DOKEOS and Moodle (Customs)No	Ms Internet Explorer 7
FORMER YUGOSLAV REPUBLIC OF MACEDONIA	DOKEOS and Moodle (Customs)No	Ms Internet Explorer 7
FRANCE		
GERMANY	Ilias Version 4.3.6	MS Internet Explorer > 8 Mozilla Firefox
GREECE	No	Internet Explorer 8
HUNGARY	Moodle (Taxation) Ilias (Customs)	MS Internet Explorer 8 oder Mozilla Firefox
IRELAND	Skillport (v7.0.4706, provided by www.skillport.com)	IE9
ITALY	E-learning Academy V. 10	Internet Explorer >=6
LATVIA	Moodle (in process of modification and adaption)	Internet Explorer 10
LITHUANIA (Tax Inspectorate) **LITHUANIA (Customs)**	Moodle Moodle iLearning	MS Internet Explorer 7 (or more), Google Chroome MS Internet Explorer 9, Mozilla Firefox
LUXEMBOURG	Moodle 2.4.1+	MS Internet Explorer 9.0
MALTA	No	
MONTENEGRO		
POLAND	Moodle 2.3.2 (Customs and Tax together)	Minimum browser: Firefox 4, Internet Explorer 8 (IE 10 required for drag and drop of files from outside the browser into Moodle) , Safari 5, Google Chrome 11, Opera 9
PORTUGAL	Blackboard 9.1	IE 9
ROMANIA	IBM LMS 1.0.5. Moodle 2.4.3	MS Internet Explorer 8
SERBIA	No	MS Internet Explorer 8
SLOVAKIA	Moodle 1.9	IE 9
SLOVENIA	eCampus	internet explorer ver. 8 (or more), Google Chroome

Participating Countries	LMS (type/version)	Browser (type/version)
SPAIN	Moodle 2.0	Intenet Explorer 9
SWEDEN **SWEDEN** Tax	Ping pong Saba 6.1	Internet Explorer 10 Microsoft Internet Explorer 9.0
THE NETHERLANDS	"Ping pong"	Internet Explorer 10
TURKEY	No	IE 8 or Mozilla Firefox (latest version)
UNITED KINGDOM	Kallidus	Internet Explorer 8 - but due to be updated further soon

6.3 REQUIREMENTS FOR eLEARNING SOLUTIONS

6.3.1 Type of eLearning Courses

DG TAXUD recognises 3 distinct types of eLearning courses: standard, IT application and performance.

The 3 groups of eLearning courses are:

A. Standard eLearning courses: these are eLearning courses on legislative and operational subjects and concern information provision, awareness raising and/or knowledge building.

B. IT application eLearning courses: these are eLearning courses on IT application/systems based on the 'Tell me, Show me, Try me, Test me' concept (Captivate based).

C. Performance simulation eLearning course: Specific skills building eLearning through Performance Simulation and/or on-line support such as immersive training (including 3D). One technical solution to provide such simulation and exercise content is to use immersive learning, simulation techniques supported by 3D, where the learner is acting in the role of e.g. customs official in a simulated three-dimensional environment, where actions take place and the learner can interact with environment, inspect objects and drill strategies and tactical steps.

6.3.2 Level Learner Interactivity

DG TAXUD requires that for each common eLearning project, the **level of learner engagement and interactivity** to be incorporated in the course is defined in the early stages of the development of a new eLearning project and that these must be appropriate to achieve the learning objectives in the most effective agreed way. As a general line to take, DG TAXUD requires a learner centred approach involving maximum learner engagement appropriate to the learning objectives and the specific project.

Table 1 displays the 4 levels of Learner engagement and interactivity which constitute a reference base for the different types of eLearning that will be ordered under BT3:

Table 1: Four identified levels of learner interactivity

Level	Description
Level 1 – Low Interactivity *Presentational Approach*	Learner studies text, sound, graphics, video etc multimedia prepared by experts in presentational style. It is primarily a one way communication. (Screen based presentations, pod-casts, video and audio material etc)
Level 2 – Standard Interactivity *Learner to Computer Interactivity*	Level 1 interactivity elements plus: Presentational material includes elements with which the learner can interact to test or apply learning and receive feedback (examples, quizzes, drag and drop exercises, multiple choice, crosswords etc)
Level 3 – Higher Interactivity *Learner to Computer Interactivity*	Level 2 interactivity elements plus: It is possible for the learner to interact with the computer using more complex branching logic and more complex decisions. The learner will experience differing consequences in the learning environment based on his/her thinking, knowledge, ability and decisions. Examples - case studies with different possible outcomes based on learner decisions and simulations (including 3D supported immersive learning).
Level 4 – Highly	Level 3 interactivity elements enriched by in-built synchronous human-

Level	Description
advanced Interactivity *Learner to Learner / Learner to Expert (in-built)*	to-human interactivity. Level 4 interactivity requires complex learner collaboration scenarios on-line (eg. competitive exercises; multi-role based case studies; quizzes and problem-solving exercises amongst learners on-line; real-time Coach/Expert interventions etc). *Note: asynchronous human-to-human interactivity, eg. eLearning courses that are further supported through non-integrated on-line collaborative tools on social software platforms like TACTIC, are not considered as Level 4 but fall under Level 1 - 3!*

6.3.3 Content Requirements

Requests for development of eLearning courses under this Framework contract will be made according to the **quantitative and qualitative criteria** as outlined here below

A set of **common requirements** is applicable to all 3 types of eLearning courses.

In addition, for each type of eLearning course, a set of **specific requirements** applies.

A. COMMON REQUIREMENTS

- Glossary A-Z: Inventory of terms used throughout a course and presented in an course integrated manner (up to 30 entries per alphabet letter)
- Help Menu/user instructions: Provision of a course integrated information on navigation rules within the eLearning course, user interface description, does & don'ts and further user recommendation
- Accessibility - standard WC3 AA or higher: A defined accessibility standard – WC3 and AA are recognised standards against which to build on-line materials which users with visual, hearing or mobility impairments can still access As these standards can compromise creativity in some instances, deviations from the above may be requested by TAXUD.
- Standard Navigation Button : Previous, Next page, Go to page x, … (see standard eLearning BT2 template used)
- Menu bar: (by default) providing for standard navigation functions within an eLearning course
- Advanced Navigation Buttons: Pause, Replay and similar Menu bar (by default) providing for advanced navigation and similar functions within an eLearning course
- Client Branding + Line of Business Sub-brand: Design of a BT3- specific generic design concept for eLearning courses which follows modern, creative and innovative market tendencies. The generic design concept allows for a high degree of flexibility for adaptations to specific design requirements per project/eLearning course subject
- Free Ongoing Technical Support to Client LMS Team : Free service provided upon installation on agreed LMS system/s
- SCORM 1.2 Compliant (higher standard if required) :Technical Interoperability standard for LMS, being a mandatory minimum criteria for BT3 projects
- Book marking at each Module completed : Learners have the option of starting the module at the point where they last stopped and/or interrupted the course
- Reusable Content Objects : Pedagogical and technical design of content in form of content objects with a high degree of re-usability within a course,

for further new courses and supporting efficient maintenance and up-dating

- <u>Modules & Assessment in one package</u>: Learning content and assessments provided in a single learning experience.
- <u>Feedback provision</u>: each Learning module ends with a congratulation and appreciation note inviting trainees to participate to the user satisfaction survey via a hyperlink.
- <u>Audio On/Off</u> : Provision of specific menu functionality (if course contains audio)
- <u>Subtitle for VO texts On/Off</u> : Provision of subtitle functionality (if course contains audio)

B. SPECIFIC REQUIREMENTS

Independent of the type of eLearning course, the developed courses are characterised by 3 levels of design complexity:.

D1 = Basic eLearning course

D2 = Enhanced eLearning course

D3 = High interactive course (3D gaming, real-time on-line interactivity, …)

Table 2: Specific requirements

Requirements/hour	Explanation	D1	D2	D3
Average no. of pages/slides per hour (excluding Assessment)	Indicative average N°/hour	50	50	70
1 complex transaction (approximately 40-50 steps) OR 2 medium transactions (approximately 20-39 steps) OR 3 simple transactions (approximately 1-19 steps)	A step would be a decision point within the e-learning. For example in systems training moving from one screen of data entry to another.	N/A	Yes	Yes
No. of paths 4 x 4 x 2 x 2	Paths equate to routes through complex branching scenarios. So… four options lead to four more options, then two further choices and two final choices.	N/A	N/A	64
No. of paths 4 x 4 x 3 x 2	As above with one extra selection choice.	N/A	N/A	96
Paths Fixed or Variable	Defines how flexible, or linear the course is - variable provides a very complex on-line experience - like a 3D game.	N/A	N/A	Fixed/Variable
Knowledge Checkpoints (Number)	Formative assessments	5-8	10-12	Yes
Simple graphics (Number)	A flat image - a photo or a graphic	Up to 20	Up to 20	Yes
Medium graphics (Number)	Detailed graphics - simple schematics/process flows/detailed graphs	7	15	Yes
Complex graphics (Number)	Complex schematics/layered graphical treatments/rich illustrations	5	10	Yes
Flash Animations/ Captivate Sequences (Number)	In contrast to an illustration, animation refers here to the process of creating motion and shape change illusion.	10-15	10	Yes
Video included (minutes)	Video, podcast (audio and video) etc	0-2	8-10	10
Assessment (Random Questions/Pool)	Checking knowledge using random question generators to provide the learner with, for example, 15 questions questions from a total pool of 30. Each time the learner accesses the questions he receives a different mix from the question pool.	10 from 20	20 from 40	N/A
Assessment (case studies)	Usually scenarios, based on real life examples	1-5	5-10	N/A
Role-based Menu Structure (2-4 roles)	Learner can experience the material in the context of a particular role - to see how the content plays out in different job related scenarios.	No	Yes	Yes
Interactivity Level (1 to 4)	see table above	1-2	3-4	3-4

6.3.4 Quality Requirements

A. GENERAL QUALITY REQUIREMENTS

- The eLearning solution will be of the highest quality for the intended purpose, based on - international best practice and internationally recognised eLearning standards when sent to DG TAXUD for acceptance

- The eLearning solution will be fully fit for the stated specific purpose and EU context when sent to DG TAXUD for acceptance

- The eLearning solution will constitute the appropriate level of return on investment and value for money.

- The eLearning solution will have structure, composition and necessary software documentation and software tools for efficient re-composition and selective updating of such learning content e.g. for needs of rapid localisation, revision and updating.

B. SPECIFIC QUALITY REQUIREMENTS

The provision of B-Train 3 services and deliverables needs to take into account specific demands and requirements and pedagogical issues in the production of centrally developed e-learning content as **detaile**d hereafter.

a)   Assumptions about the learners

The following expectations and assumptions about the learners are to guide the specification, design and delivery of learning content under B-Train 3. The list is indicative.

Table 3: Assumptions about the learners

Factor	Definition
Type of learners	They are adult learners in a work context (taxation/customs/traders)
Motivation	They are learning for the purpose of developing competence at work in the field of taxation or customs
Cultural background of learners	They are European (meaning EU Member states and additional countries participating in the Fiscalis/Customs 2013 programmes)
Diversity	Learners are diverse in terms of : - organisational culture - specific working practices - roles - individual culture - language - age - gender.
Audience	(2) The audience for specific content may be more homogenous than a random statistically representative sample of all EU C&T and trader's personnel, but will almost always be an audience spread across a large number of countries and working contexts. (3) Learners may have a variety of different learning styles that must be accommodated.

b)   Content Creation and Review Process

DG TAXUD is constantly seeking to ensure the most effective eLearning content creation and review process. DG TAXUD expects to work with experienced professionals, in particular project managers and learning designers who have the appropriate profiles, competence and experience for their roles.

DG TAXUD requires the contractor to propose and adopt the most appropriate approach to content development and review for each project, based on the specific project brief provided and international best practice.

The approach to a project may include all or some of the following elements as listed in the table.

Table 4 : Project elements

1.	Pro-active interrogation and response to the TAXUD project brief by the contractor.
2.	Proposal of the most appropriate project management approach for the project.
3.	Proposal of a considered proposed learning design for each project
4.	Proposal of most appropriate content creation tools for the project
5.	Proposal of graphical design and appropriate quality artwork for the project
6.	Propose most appropriate technical design solutions (interface, navigation etc.)
7.	Task analysis as needed.[10]
8.	Provision of templates or other tools to help SME input content as needed
9.	Maintenance of all necessary contacts and relationships to achieve the learning outcomes of a project, in particular the needed relationship with subject matter experts and DG TAXUD project managers
10.	Provision of appropriate content review tools and processes
11.	Selecting, structuring and extensively editing 'raw data' provided by subject matter experts to create finished content for delivery to DG TAXUD
12.	Management of interactions with individuals and groups of subject matter experts to optimise the building of quality content
13.	Optimise use of meeting time
14.	Ensure most effective use of subject matter experts available time
15.	Making full use of the expertise and experience of the subject matter experts
16.	Appropriate management of project time within contractual framework
17.	Writing of content scripts in English (see script requirements, paragraph j)
18.	Writing of voiceover scripts in English (see voiceover requirements, paragraph k)

c) Requirements for eLearning Content Objects and Assets

Under B-Train 3, the contractor will be expected to propose to DG TAXUD the most effective ways of managing learning assets and content objects, suited to the business context and to support DG TAXUD in learning content asset and object management. This concerns especially the need for tools to efficiently label, identify, search, retrieve and process learning content for efficient re-composition and selective updating e.g. for needs of rapid localisation, revision and updating.

Content will normally be developed in the form of standalone content objects to facilitate ease of use and re-use in a variety of contexts, and for ease of updating. Content objects will consist of learning assets using any agreed media (text, graphics, video, simulations etc) Subject matter will normally be subdivided into the smallest feasible standalone objects for this purpose. Content objects may be combined and distributed as standard courses.

d) Requirements Regarding Interface, Navigation and Usability

All learning content should meet appropriate international standards in relation to usability, interface, technical access, orientation, navigation, and general use without the need for specialised support, to be agreed with DG TAXUD.

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[10] Please see e.g. http://en.wikipedia.org/wiki/Task_analysis

e)   Appropriate choice of media for all learning content elements

The choice of media for all learning content elements must be clearly justified by the agreed instructional design strategy.

The decision to use text, photos, videos, animations, simulations or any other type of media must be justified by the fact that the media provides the means to ensure the target learners achieve the stated learning objectives. Media that cannot be justified by this criterion must not be used.

Complex multimedia or 3D may be justified for long life content to be distributed to a wide audience whereas a simpler solution may be appropriate to content that will have a shorter period of use. Decisions on such issues will be taken by DG TAXUD in the context of each specific project.

f)   Requirements Regarding Accessibility

DG TAXUD requires that learning content meets appropriate international standards in relation to accessibility by persons with disability. This aspect will be specified by DG TAXUD on a case to case basis, as some of the learning content and information provided is specific training course content (eg. 3D simulations) requiring enhanced visual sight and capability from the user.

g)   Requirements Regarding Interoperability

DG TAXUD requires that learning content and IT tools and services produced under BT3, as much as technically possible, meet appropriate EU standards and recommendations in relation to interoperability. This aspect will be specified by DG TAXUD on a case to case basis.

h)   Requirements regarding Learning Objectives (and proposed Learning Solutions to address those Objectives)

DG TAXUD requires that for each content object to be produced, the learning objectives must be clearly identified by the contractor for the target learner group in advance. Learning objectives should be determined through study of relevant resources and interrogation of the subject with SMEs and DG TAXUD.

Learning objectives should be based on Blooms Taxonomy[11] or any other appropriate agreed source, based on international best practice. Contractors should note the significant challenge of providing learning solutions that remain continuously valuable to a wide user base over time, since learning needs rarely remain fixed over time. All proposed solutions must maximise return on training investment in the context of potentially shifting learning needs, for example by combining fixed knowledge resources with flexible learning solutions.

i)   Requirements regarding Instructional Design

DG TAXUD requires that for each learning content object produced, the instructional design concept or model be stated and agreed with DG TAXUD and that such concepts and models be in line with international best practice to achieve maximum learning impact for the target learner group.

j)   Requirements Regarding Learning Content Scripts

DG TAXUD has specific requirements regarding learning content scripts in English. The quality of the English version is of utmost importance because the master version of all content is the English version.

Such scripts, on first presentation to DG TAXUD, should meet the following criteria as listed in the table.

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[11] For Bloom's Taxonomy, please see e.g. http://en.wikipedia.org/wiki/Bloom's_Taxonomy

Table 5: Requirements regarding learning content scripts

1.	Fully correct standard written English, free of all spelling and grammatical errors.
2.	High quality sentence construction that clearly and accurately expresses the intended meaning
3.	Choice of words should be appropriate to convey the intended meaning to persons whose native language is not English
4.	Points arising from legal texts must be conveyed with 100% accuracy, based on the legal text
5.	The script must be created by a person whose English language competence is of mother tongue level or at least of a level equal to passing a Certificate of Proficiency in English (http://en.wikipedia.org/wiki/Certificate_of_Proficiency_in_English)
6.	Words, phrases and idioms that are not standard in English as spoken by mother tongue speakers should not be used unless these are essential to the specific context and are fully explained
7.	Abbreviations should be used sparingly and only if necessary
8.	Specialised terms or abbreviations relating to the subject matter must be explained
9.	The choice of words and phrases should be such that the text will translate easily into a wide variety of European languages
10.	The script content should be fully consistent with other known relevant material (DG TAXUD publications, courses etc)
11.	The script must be fully appropriate to the target audience and context
12.	The script must be sensitive to EU context and DG TAXUD/European Commission role and relationships

k)   Requirements Regarding Learning Content Voiceovers (all languages)

DG TAXUD has the following requirements in relation to eLearning content voiceover.

Table 6: Requirements regarding learning content voiceovers (all languages)

1.	Voiceover script must be written to closely and appropriately align with, but not necessarily replicate, on-screen text. The manner of aligning the content of on-screen text with the content of voiceover script is considered an important aspect of instructional design quality.
2.	Voiceover must consist of fully correct standard *spoken* expression, free of all grammatical and pronunciation errors.
3.	Colloquial and very informal modes of oral expression should not normally be used.
4.	Voiceover should normally delivered by a professional actor speaking in his/her mother tongue.
5.	Instructional designers have responsibility to know how specialised terms (for example legal references and scientific terms) in voiceover scripts should be expressed. *Questions of this nature should be referred to DG TAXUD by the contractor before the voiceover is recorded.*
6.	All actors should use a consistent mode of expression for repeated terms (in particular abbreviations / legal references etc).
7.	Machine generated voiceover may be used by agreement with DG TAXUD on specific projects
8.	Voiceover must be fully and appropriately synchronised with on screen text and other elements *on first delivery to DG TAXUD*
9.	The tone of voice used should be appropriate to the subject matter
10.	The tone of voice used should engage the learner
11.	Points arising from legal texts must be conveyed with 100% accuracy based on the legal text
12.	Non-standard words, phrases or idioms should not be used unless these are essential to the specific context and are fully explained
13.	Abbreviations should not normally be used in voiceover unless it is necessary and they are explained
14.	The voiceover must be fully appropriate to the target audience and context
15.	Voiceover may be supported by subtitling which may be switched on/off by the user (to be agreed with DG TAXUD for specific projects)

l)   Requirements for eLearning Maintenance

All items produced must be placed under strict configuration management in order to support their iterative, incremental production and their future maintenance and to be able to evaluate the consequences when changing an item if it has relationships with others.

m)   Requirements for eLearning Localisation (all languages)

(1) Requirement for producing content in such a way that the localisation time and cost are optimal.

(2) Training developed under BT1 or BT2 can be subject to localisation under BT3. The processes and tools developed under BT2 for this purpose will then be reused if no more efficient process can be provided by the BT3 contractor. See Annex 16 and Annex 17.

(3) The preparation of translation files and documents and the setting up of streamlined processes to handle a great number of various localisation projects in parallel is the task of the BT3 contractor.

(4) Great care must be taken by the contractor of each language's characteristics being possible to integrate them in the eLearning courses technical environment.

(5) XLIFF (XML Localisation Interchange File Format). XLIFF is an XML-based format created to standardize localization. It was standardised by OASIS in 2002. Current specification is V1.2 (as of 2008-01-22).

6.3.5 Output Format Specifications

The electronic learning content is expected to be provided as standalone course (exe, html and iso) plus SCORM package, compatible with the Learning Management System (LMS) used by the EU MS Customs and Taxation Authorities and their Training units. (see section 6.2)

The installation packages should also contain a Quick Start Guide explaining how to install and start using the eLearning course. In addition it should also cover the most recurrent issues when installing eLearning courses.

The media file format is typically Flash and for 3D simulations Shockwave, but these will be further specified by DG TAXUD in relation to specific projects.

The standardisation work in the area of learning technologies is rapidly developing. In function of the technical evolutions, DG TAXUD may set new delivery formats and standards as applicable.[12]

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[12] For scope of standardisation work potentially of applicability, please refer to CEN LT-SO website (Learning Technologies Standards Observatory). Link: http://www.cen-ltso.net/

6.4 REQUIREMENTS FOR INFRASTRUCTURE.

(1) The contractor must specify, size, provide, host, install, configure, operate, monitor and administer the necessary infrastructure (and its maintenance) in his premises for the successful execution of all the work packages with the exception of those for which the infrastructure is provided by the Commission.

(2) Note that the Commission reserves its right to host the infrastructure in its premises (e.g. in the Commission Data Centre) and provide remote access to contractors, including the BT3 contractor.

(3) The Commission may require on demand fully managed hosting services. These services will include as a minimum: (a) the required infrastructure (hardware, software and network); (b) Training management functions; (c) Supporting services.

(4) The Commission relies on suppliers past experience and expertise to provide flawless services to the selected users in order to free up the limited Commission internal resources, to concentrate on the coordination with the participating countries and to ensure the success of the pilot experience from the training policy side.

(5) It is the contractor's responsibility to size the infrastructure to comply with the number of users and provide accessibility in line with the market best practices.

(6) The following services must also be included in the offer for all server(s) specified:
  (a) Server management, monitoring and maintenance
  (b) Network infrastructure support, monitoring and maintenance
  (c) Internet bandwidth to enable access from any standard web browser
  (d) Backup and restore services
  (e) Security services

6.5 STAFF PROFILE REQUIREMENTS.

The contractor must be able to rely on following profiles at any time during the course of this FWC.

Profile	Minimum requirements
P1 Portfolio/Project manager	- 5 years of recent relevant experience in field of contract and project management, - including the management of multi-stakeholders eLearning projects.
P2 Quality manager	- 5 years of recent relevant experience as quality assurance and quality control manager, - including quality management of minimum 2 eLearning projects.
P3 Pedagogue – knowledge manager	- 5 years of recent relevant experience of which at least 3 years in the domain of eLearning including the pedagogical lead of minimum 3 eLearning modules.
P4 eLearning Designer	- 3 years of recent relevant experience including the design lead of minimum 3 eLearning modules.
P5 eLearning Developer	- 3 years of recent relevant experience including the technical lead of minimum 3 eLearning modules.
P6 On line collaboration and social network consultant	- 3 years of recent relevant experience
P7 Customs and Taxation Expert	- 3 years of recent relevant experience
P8 Change Management Expert	- 3 years of recent relevant experience, including the lead of at least 1 major project in the domain of Human Resources.
P9 Expert in Performance and Competence Development through training and Human Resources processes	- 3 years of recent relevant experience
P10 Learning Management Environment Developer	- 3 years of recent relevant experience as technical team leader, including the lead over at least 1 major successfully completed project the in the domain of Learning Management Environment
P11 Helpdesk Officer	- 2 years of recent relevant experience
P12 Proofreader English	- minimum certified CERF C2 level by an accredited organisation
P13 Media and Communication Expert	- 3 years of recent relevant experience
P14 Webdesigner/developer	- 3 years of recent relevant experience

7 PERFORMANCE AND QUALITY SPECIFICATIONS

In order to ensure the deliverables meet DG TAXUDs expectations, the quality of the services will be measured and traced in a Delivery Tracking Matrix (DTM).

The Framework Quality Plan (FQP), see Annex 10, sets the principle for the quality measurement and application of liquidated damages when minimum standards have not been met. Reference template FQP has to be finalised in mutual agreement between TAXUD and the Contractor under first Specific Contract.

For each Specific Contract (SC) a Specific Quality Plan (SQP) is issued by the Contractor in line with the principles defined in the FQP. It will list the Service Quality Indicators (SQI) applicable to the services provided under this SC. The list of applicable SQI may be further complemented with SQI in function of the Request for Action (RfA) called under this SC

A Global Quality Indicator (GQI) will be computed based on the SQIs according to a mutually agreed formula. The GQI defines the general satisfaction of the delivered services/project and may lead to liquidated damages as set in the FQP or further defined in the SQP.

8 GENERAL SPECIFICATIONS

8.1 RELATIONSHIP

The contractor will perform the activities under the authority and the close control of the DG TAXUD Central EU Training Team (CTT), and in full compliance with the Quality Plans. The instruments of this control shall include all the deliverables specified in the WP 1.3 Portfolio/Project management.

In terms of inter-relationship between contractors, the contractor reports to the CTT only.

It is important to recognise that delays incurred by one contractor will ripple down to the other parties downstream implying that all parties will have to take adequate steps to address this risk.

8.2 ORDER AND ACCEPTANCE MECHANISM

The mechanism to order services, validate the quality and accept the deliverables is schematically illustrated as follows:
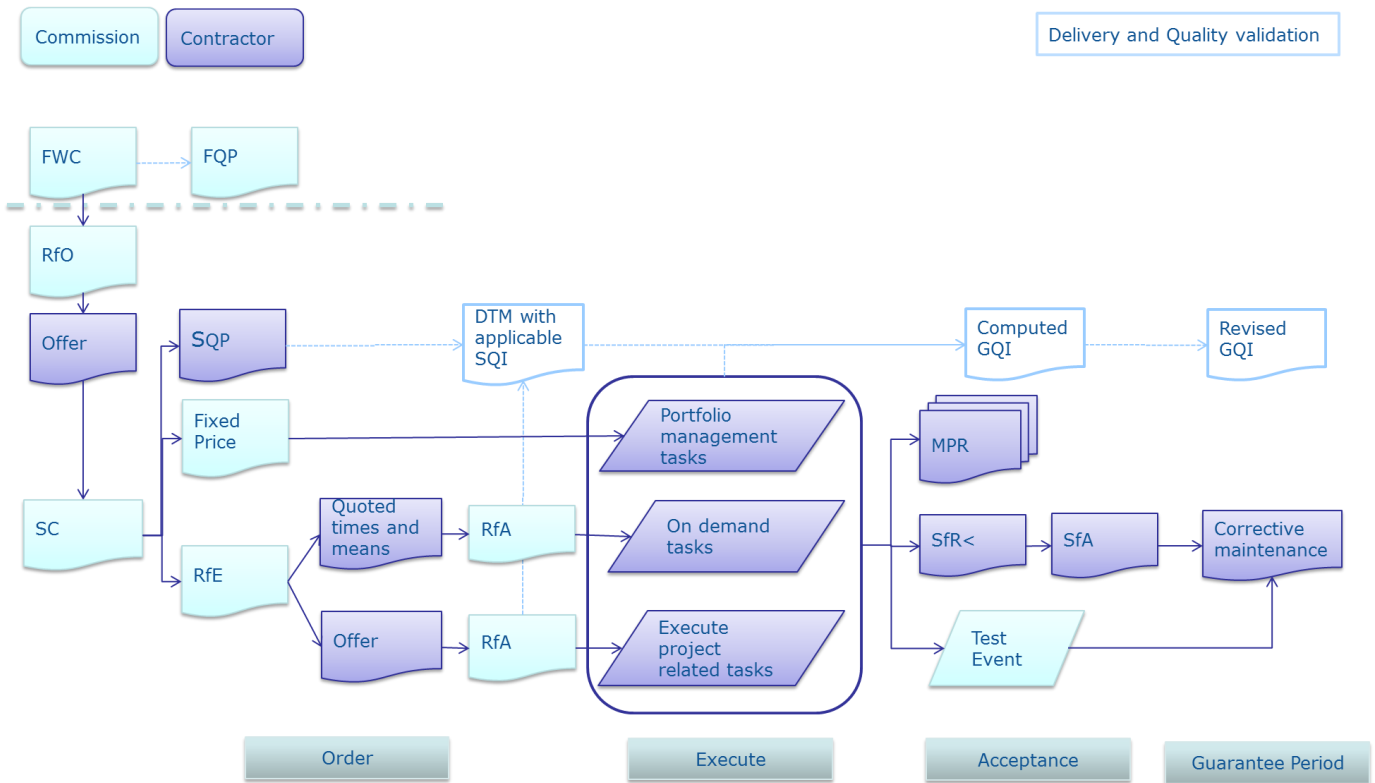
8.2.1 Order mechanism

As defined in the model framework contract, Article I.4, services under this FWC are ordered through a Specific Contract (SC). The SC will be issued following a Request for Offer (RfO) from TAXUD and consequently the contractor's Offer accepted by TAXUD.

The SC will cover the ongoing relevant WP1 services, other specific service request and rough estimates for planned projects.

For each SC falling under this FWC, the contractor will:
1. translate the specific offer into Activity Packages;
2. provide TAXUD with a breakdown of planned Activity Packages into Working Packages for the FWC B-Train 3 as defined above in section 5, Tasks and Deliverables.

For each SC falling under this FWC the contractor will provide TAXUD with a list of deliverables to be produced and services to be supplied in the DTM. The DTM includes the deliverable data, delivery dates, and acceptance mechanisms as well as dedicated SQI's.

Deliverables related to WP 1.3 Portfolio/Project management, are automatically called upon whenever starting a SC.

The SC automatically contains a provision for Service Delivery and Support. The services will be called on demand based on a Request for Action (RfA) by TAXUD for which the contractor has to provide its estimated person-days per consulting profile.

8.2.2 Acceptance and Delivery Mechanism

Three types of acceptance procedures are used for the services provided under this FWC:

1. MPR

2. Documentary Review

3. Acceptance Testing (Test Event)

The detailed acceptance processes are described in the FQP.

8.3 DELIVERABLES

The contractor must deliver the documents electronically, on paper only if requested, in a format compatible the Commission's office tools[13] and according to the procedures defined in the applicable quality plan. All written deliverables are to be produced in English, unless stated otherwise. Some documents may need translation.

The acceptance procedures applicable to the deliverables and services are specified in the Specific Contracts. No formal acceptance applies for deliverables for which neither the Tendering Specifications nor the QP define an acceptance procedure.

Once accepted, all deliverables become the property of the Commission, which becomes then the only party that can authorise their further use and distribution.

8.4 STAFF AND AVAILABILITY

The contractor is responsible for providing staff (having the adequate level of qualification and therefore being adequately trained) which complies with the role profiles defined in his offer. He has the responsibility to set up an adequate team organisation in order to perform the activities and deliver the products and services defined in full compliance with the quality requirements.

The contractor must demonstrate that each person proposed in the team meets the specifications of the profile to which he is assigned. Each role profile must be specified by both a precise job description and staff qualification requirements, the latter in terms of education, professional experience, expertise and personal qualities.

In case of key staff replacement, both parties, the Commission and the Contractor, must agree on the CV of the new staff at least 1 month beforehand. The contractor will provide, at his own expense, the training for each new staff member. The contractor will describe the team induction and team management in the QP.

The contractor must ensure that his staff is fully aware of the contractor's and project quality system, of the project security requirements as well as the goal, context, planning and political importance of the project.

The contractor needs to offer a continuous telephone & e-mail presence during the Commission working days and hours.

8.5 PLACE OF WORK

The work will be performed primarily at the contractor's premises located within the territory of one of the 28 Member States. Some meetings as well as software test sessions may be held in the Commission premises or the premises of another contractor involved in the project.

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[13]   The current Commission's office tools are Microsoft Windows and Microsoft Office

8.6 INFRASTRUCTURE

The contractor must specify size of, provide, host, install, configure, stage-in, fine-tune, operate, monitor and administer the necessary infrastructure (and its maintenance) in his premises for the successful execution of all the work packages.

Note that the Commission reserves its right to host the infrastructure in its premises (e.g. in the Commission Data Centre) and provide remote access to contractors, including the BT3 contractor. The contractor must have an office automation environment which is compatible and inter-operable with that of DG TAXUD. At the time of writing the Invitation to Tender, the office automation environment is as follows:

- Windows 7
- Office 2010
- Internet Explorer 10
- Mozilla Firefox ESR 31.X

The contractor will propose any additional tools considered necessary to improve the efficiency, the effectiveness and the quality of its service. Those tools must remain compatible with the current infrastructure.

If located in his premises, the contractor will need to take the necessary insurance to cover the needed infrastructure, which would be possibly purchased in the name of the Commission, against usual risks (fire, flood, thefts, etc).

8.7 SECURITY

The contractual confidentiality clauses apply to all team members and all other persons at the contractor's side involved in the performance of the Framework Contract, which handle or have access to the information under BT3.

Security is a major concern. Therefore, due to the sensitivity and the political visibility of the customs and fiscal projects, the contractor must take the necessary steps to:

(1)   Maintain the CTT informed of the composition of the contractor's team and provide the CVs for each staff member;

(2)   Restrict access to the project information (stored internally or available on any web site) to the staff known by the Commission to be allocated to the projects;

(3)   Take the necessary security protection to avoid unauthorised project documentation and information dissemination to external parties;

(4)   Escalate any security incident to the Commission;

The contractor has to describe the security system that he applies to the projects in the QP.

The Commission reserves the right to impose additional specific physical and logical security rules in the future, should the need arise.

The Commission reserves the right to perform security audits of the project organisation in the contractor's premises. The Commission may elect to contract with a third party to perform these audits. The contractor commits to co-operate fully with the Commission during the audits (Refer to WP 1.3, point 12). In particular, the contractor commits to authorise access to the whole of the project information and respective IT systems located in his premises no later than two

weeks after the request of the Commission and to answer the questions from the Commission during those audits.

Regarding access to the Commission network and computer environment, <u>a security convention</u> will be signed by the contractor in advance.

8.8 MEETINGS

8.8.1 Meetings at Commission premises

The term 'meetings in the Commission premises' includes meetings held within a maximum distance of 50 km from those premises in Brussels (for practicality reasons this type of meetings may take place in the contractors premises, if mutually agreed).

Meetings at the Commission premises (Brussels/Luxembourg) **will not** be subject to reimbursement of related travel and subsistence costs. **Those costs <u>are</u> to be included in the unit prices**. The contractor is responsible for including human resources required to attend meetings in the Commission premises. The Commission may allow exceptions to this rule in justified cases.

8.8.2 Meetings at other premises

Some of the activities will take place at other than the Commission premises. These can take place in other contractor's premises or in one of the Member States or Participating Country.

The contractor is responsible for considering in his offer the human resources required to attend the specified number of meetings in other premises. The contractor's travel and subsistence expenditure for those meetings will be reimbursed according to the rules specified in Annex 5 to the model Framework Contract (if the meeting location is further than 50 km from the Commission premises). The Commission will allocate a budget provision (T28 in the Price List [Annex 3]) to cover the expenses related to those meetings. Therefore, **those costs <u>are not</u> to be included in the unit prices**.

8.9 MISSIONS

Personnel involved in the project may be required to undertake missions in the Participating Countries to assist Commission officials in their tasks, or to attend meetings and workshops abroad on request of the Commission. Therefore, the contractor is responsible for considering the human resources required to perform the specified number of missions. The contractor's travel and subsistence expenditure for the missions will be reimbursed according to the rules specified in Annex 5 to the model Framework Contract. The Commission will allocate a provisional budget to cover the expenses related to those missions. Therefore, **those costs <u>are not</u> to be included in the unit prices**.

9 ASSESSMENT OF OFFERS

9.1 ADMINISTRATIVE INFORMATION

For details on conditions and information on documents and administrative information that need to be submitted for each of the companies participating in the offer, please see Annex 1: Questionnaire.

9.2 EXCLUSION CRITERIA

The Commission reserves its right to exclude offers which do not meet the exclusion criteria as described in section 9.1 of Annex 4: Guidebook for Tenderers and established in section 2 of Annex 1: Questionnaire. This Annex 1 also details the information to provide with respect to the exclusion criteria.

9.3 SELECTION CRITERIA

Tenderers will be selected for the quality assessment only if they can prove that they have (1) sufficient economic and financial capacity, and (2) sufficient technical and professional capacity.

The selection process is described further in section 9.2 of Annex 4: Guidebook for Tenderers. Sections 3 and 4 of Annex 1: Questionnaire establish the criteria to be met and outline what type of information tenderers have to provide.

9.4 AWARD CRITERIA

9.4.1 Technical evaluation

Please refer to Annex 4 – Guidebook for Tenderers, section 9.3.1 and Annex 1 – Questionnaire, section 5.

The technical evaluation will be carried out by establishing an overall technical score for the technical proposal that takes into account the individual scores for the award criteria listed in section 5.2. of the Questionnaire.

The quality of the offers will be evaluated by the degree to which they fulfil the requirements as specified under sections 4, 5, 6, 7 and 8 of the Tendering Specifications.

The importance given to each award criterion is stated in weight (percentage) and points. The maximum overall score, as laid down in the Questionnaire, is 1000 points.

Selected companies will have to score at least 50% for each award criterion.

Offers for which the technical quality assessment score is less than 600 points or offers for which less than half the points are scored on an individual criterion will not be considered for the price assessment and for the award of the contract.

The offer found to be of the best quality will receive a normalised quality indicator of 100 points. The remaining offers will receive lower normalised quality indicators in proportion to their quality.
The technical offer must cover all aspects and tasks required by the Tendering Specifications and provide all the information needed to comply with the award criteria.

Offers deviating from the requirements or not covering all requirements may be excluded on the basis of non-conformity with the tendering specifications and will therefore not be evaluated.

9.4.2 Financial evaluation

Please refer to Annex 4 – Guidebook for Tenderers, sections 9.3.2 and 6.3.6.

The financial evaluation will be performed on the basis of the prices stated in the Annex 3 which constitutes the financial offer.

Your attention is drawn to the fact that these figures do not constitute any formal obligation for the Commission to procure any amount of services.

Prices must be inclusive of all additional costs. Please be aware of Article 151 of the Rules of Application of the Financial Regulation on abnormally low price offers.

Any assumption, hypothesis or condition in the formulation of the financial offer shall cause rejection of the whole offer.

The offer found to be the cheapest will receive a normalised price indicator of 100 points. The remaining offers will receive lower normalised price indicators in proportion to their prices.

The price for the tender must be quoted in euro.

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

9.4.3 Award

Please refer to Annex 4 – Guidebook for Tenderers, section 9.4.

The offer presenting the best value for money will be identified in the following way:

A weighting factor of 70% will be applied to the normalised quality indicator and a weighting factor of 30% will be applied to the normalised price indicator. The highest result will indicate the offer presenting the best value for money:

(Normalised quality × 70%) + (Normalised Price × 30%) = Normalised result