

**CEDEFOP**European Centre for the Development
of Vocational Training

FINANCE AND PROCUREMENT

DRS/PRO/DELE/RB(2015)02102

Thessaloniki, 31 July 2015

OPEN INVITATION TO TENDER

The changing nature and role of vocational education and training in Europe

AO/DSI/JB/Changing_Role_of_Vet/009/15REFERENCE: *Contract notice 2015/S 145-267089 of 30/07/2015*

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

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

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

or

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

or

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

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

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

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

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

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

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

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

<p>OPEN INVITATION TO TENDER</p> <p><i>CEDEFOP No: AO/DSI/JP/Changing_Role_of_Vet/009/15</i></p> <p><i>The changing nature and role of vocational education and training in Europe</i></p> <p>Name of tenderer:</p> <p>NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE</p>

The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in section 6 of the attached Tender Specifications.

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

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

7.1 Contacts before the final date for submission of tenders:

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

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

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

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

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

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.

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

7.3 Contacts after the opening of tenders:

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

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	21/09/2015	n/a
Last date on which clarifications are issued by Cedefop	as soon as possible	
Deadline for submission of tenders (hand delivered)	28/09/2015	17h00
Deadline for submission of tenders by post / courier	28/09/2015	n/a
Validity of the tenders	28/03/2016	n/a
Tender opening session	12/10/2015	11h00
Estimated contract signature date	December 2015	

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

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

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

10. All costs incurred in preparing and submitting tenders should be borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of the Contract with the successful tenderer.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

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

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

Yours sincerely,

signed G. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DSI/JB/Changing_Role_of_Vet/009/15

***‘The changing nature and role of vocational education
and training in Europe’***

Tender Specifications

Table of contents

Introduction to Cedefop: Europe's agency for training policy	9
1. Overview of this tender procedure	11
1.1. Description and type of the contract	11
1.2. Place of delivery or performance	12
1.3. Division into lots	12
1.4. Variants.....	12
1.5. Value or quantity of purchase	12
1.6. Duration of the contract	12
1.7. Main terms of financing and payment.....	13
2. Terms of Reference.....	14
2.1 General approach	14
2.2 Objective, purpose and expected results.....	18
2.3 Reports	21
2.4 Meetings and Travel expenses.....	22
3 Specific information concerning participation to this tender procedure	24
3.1 Exclusion criteria	24
3.2 Selection criteria.....	24
3.3 Legal Position.....	27
4 Additional information concerning participation to this tender procedure	28
4.1 Joint Offers/ Groupings (Consortia)	28
4.2 Subcontracting/Subcontractors	29
5 Award of the contract	31
5.1 Technical evaluation.....	31
5.2 Technical proposal	32
5.3 Financial proposal / Financial Scenario	33
5.4 Financial evaluation	34
6 Information on presentation and content of tender.....	35
6.1 Envelope A - Supporting documents	35
6.2 Envelope B – Technical proposal	35
6.3 Envelope C – Financial proposal.....	35

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on Exclusion Criteria
Annex D:	Legal Entity Form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Questionnaires 1-4
Annex H:	Financial Proposal (6 tables)
Annex I:	Power of Attorney (Models 1 and 2)
Annex J:	Model of Letter of Intent for Subcontractor/s
Annex K:	Cedefop Style Manual

Introduction to Cedefop: Europe's agency for training policy

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

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

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

Cedefop's objective and priorities for 2012-16

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

- **Supporting modernisation of VET systems**

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

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

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

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

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

⁽¹⁾ Cedefop also works with Iceland and Norway.

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

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

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

Cedefop's information

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

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

1. OVERVIEW OF THIS TENDER PROCEDURE

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

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

1.1. Description and type of the contract

a) *Title of the contract:*

The changing nature and role of vocational education and training in Europe.

b) Short description of content of this contract:

This framework contract falls under Cedefop's support to the modernisation of VET systems in Europe. The study covered by the contract will contribute to a better understanding of how European vocational education and training (VET) is changing. The study takes as its starting point that traditional VET at upper secondary level is under considerable pressure in some countries. At the same time we observe that vocationally oriented education and training is frequently delivered by institutions outside the traditional VET sector – pointing towards a broader and more diverse definition of VET being applied. A key objective of the study, based on a mapping of developments during the last two decades, is to analyse these changes, taking into account factors internal as well as external to the education and training system. The contractor will collect and analyse relevant data at national and European level to address these issues. The work of the contractor will build on and contribute to previous and ongoing work of Cedefop.

c) Type of contract: Framework Service Contract. Cedefop will offer a single framework contract to the selected tenderer. The framework contract establishes the basic terms for 6 work assignments. The framework contract also clarifies the relationship between the separate assignments and how they in combination can respond to the outlined tasks. The maximum duration of the framework contract will be 36 months but the assignments will have a shorter duration, the maximum being 24 months. The tasks foreseen under this contract will be performed by the Contractor upon signature of separate Order Forms issued by Cedefop for each work assignment. Work assignments will run in parallel. The content of each Order Form will be finalised in line with the tender and shall stipulate the tasks to be performed by the Contractor, the deliverables, the timetable, the budget, the human resources/experts to be allocated and the reports to be presented.

1.2. Place of delivery or performance

The tasks will be completed in the Contractor's premises. Meetings will take place at Cedefop's premises (Brussels and Thessaloniki).

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

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

1.5. Value or quantity of purchase

Cedefop will offer a single framework contract for a series of 6 work assignments.

The following estimated budget is foreseen for each work assignment:

- (a) Work assignment 1 – Defining VET - approx. 63,000 €
- (b) Work assignment 2 – External factors influencing VET - approx. 185,000 €
- (c) Work assignment 3– The changing role of initial VET at upper secondary level - approx. 185,000 €
- (d) Work assignment 4 – VET as lifelong learning - approx. 185,000 €
- (e) Work assignment 5 – VET in higher education - approx. 185,000 €
- (f) Work assignment 6 – Synthesis and VET Scenarios for the future – approx. 196,000 €

The estimated total budget for the required services (for all 6 work assignments) described in this call for tenders is approx. **1,000,000 €** (without VAT) over a maximum 36 month period. Tenderers should be aware that the information on volume is purely indicative, shall not be binding on Cedefop and should not be considered as a warranty as to the definitive value of the contract. The sum of the amounts of the Order Forms to be issued after the Framework Contract is signed may not reach the aforementioned estimated value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The final value of the framework contract will ultimately depend on the orders which Cedefop may place through Order Forms.

1.6. Duration of the contract

The framework contract shall enter into force on the date of signature of the last contracting party and shall have a total duration of maximum **36 months**. The assignments that will be ordered throughout the duration of the contract will be sequenced according to the research topics outlined in section 2.2 of this tender specification and should individually not exceed 24 months. Assignments should be sequenced in a way which ensures analytical consistency, methodological coordination and sharing and exchange of data.

1.7. Main terms of financing and payment

Three payments for each work assignment/order form are foreseen. Payments will be made as follows:

- **Pre-financing:** 30% after contract signature of each order form and within 30 days of submission of invoices and at the conditions set out in the draft contract.
- **Interim payment:** 30% after submission of interim report of each order form and within 60 days of submission of invoices and at the conditions set out in the draft contract.
- **Payment of the balance:** 40% after submission of final report of each order form and within 60 days of submission of invoices and at the conditions set out in the draft contract.

For further details please refer to the draft contract (annex B to the tender documents).

2. TERMS OF REFERENCE

The purpose of this study is to improve our understanding of how vocational education and training (VET) is changing in the 28 member states of the EU as well as Iceland and Norway. While Cedefop's skills needs forecasts predict a high and slightly increased demand for medium level vocational qualifications in the next decade⁽²⁾, several EU countries now experience declining enrolment in initial VET at upper secondary level. This combined with the fact that the size and status of the VET-sector varies significantly between European countries, signals that the traditional VET-sector is under considerable pressure. At the same time, and contrary to this negative tendency, institutions outside the traditional VET sector are increasingly developing and offering vocationally oriented programmes. The extensive and important role played by continuing vocational education and training in the public and private sector adds to this complexity and makes the task of judging the character and boundaries of vocational education and training in Europe increasingly more difficult. The study should, over a 3-year period, analyse how vocationally oriented education and training has developed and changed in the last two decades (1995-2015) and on this basis point to the main challenges and opportunities facing the sub-sector today. The study needs to address this from two angles: First, the changes in vocationally oriented education and training is the result of political and structural changes in the overall education and training system, in some cases reflecting higher priority being given to general and academic education compared to VET. Second, the changes in vocationally oriented education and training are the result of external factors, notably demographic developments and labour market trends driven by technological and organisational change. Combining these two angles of analysis, the research should clarify how VET is defined and understood by stakeholders at national level, how this understanding has evolved over time and, notably, how it has been translated into political strategies, institutional solutions and didactic approaches. The study, to be closely coordinated with other relevant Cedefop studies and activities, gives us the opportunity to better understand the dynamics of VET-developments and thus provide a better basis for policy-cooperation and intervention in this area.

2.1 General approach

The separate assignments of this project should be designed in a way which allows for a comprehensive analysis of the changing nature and role of VET in the 28 member states of the EU as well as Iceland and Norway. All the 6 assignments, from their particular perspectives, need to consider the national context in which VET develops and changes and on this basis identify challenges and opportunities faced by Europe as a whole. The following sections point to the specific issues to be addressed and reflected by the study.

2.1.1 The definition of VET

The study needs to depart from an initial definition of what is meant by vocational education and training. This initial definition – to be outlined in detail by the contractor - will serve as a reference point for the analysis and comparison of national approaches. The findings of the study will decide whether a review of this definition will be necessary. The short definition already provided by Cedefop⁽³⁾ offers a starting point:

'(VET is understood as) education and training which aims to equip people with knowledge, know-how, skills and/or competences required in particular occupations or more broadly in the labour market'.

² Cedefop Briefing note (June 2015), Europe's uneven return to job growth

³ Cedefop (2014) *Terminology of vocational education and training*, Luxembourg: Publications office

In other words, a VET candidate must not only acquire abstract knowledge, but must be able to apply this knowledge, for example in the form of technical skills and reflective competences, to real problems in concrete situations. VET, as an implication, leans towards a combination of institutionalised (in the classroom) and experience based learning (at the work-place, through practise). While the delivery of VET takes many forms in different countries and institutions, a subject or discipline-oriented learning process isolated from work-processes and practise may be said to fall short of the above definition. The notion of apprenticeships as a 'pure' form of vocational education and training refers directly to this combination of learning forms and venues. The definition avoids linking VET to a particular institutional type or qualification level. This not only reflects the existing diversity of VET solutions in different countries but leaves the door open for VET to be provided for a wide group of (lifelong) learners at any level and in a wide variety of institutions. The study should carefully analyse the way VET is defined and understood in the different countries and how this is influencing the understanding and development of the sub-sector. The issue is whether the above (broad) understanding of VET is recognised at national level or whether a narrower understanding is dominating?

2.1.2 External and contextual drivers for VET change

VET is developing in a constant interaction and exchange with society and the labour market outside the education and training system. How rapidly VET provisions are able and willing to react and adapt to these external influences varies, but needs to be taken into account by the study. Looking back at developments during the last quarter century makes it possible to reflect on the rate of change in the different countries and how receptive/protective VET-systems are to external requirements and changes. The following drivers are of particular importance and need to be addressed by the study: First, demographic trends will have a direct impact on the size and orientation of education and training systems. The general tendency towards an ageing European population reduces the number of potential candidates seeking initial VET. The same tendency will influence the need for continuing VET and possibly point to a shift in priorities and provisions. A core issue is whether VET systems and institutions are able to make the change from mainly providing IVET to CVET/LLL and whether policies, legal and institutional arrangements are in place to support this process. Second, understanding VET requires an understanding of how labour markets and work processes change: How is the VET system influenced by the emergence of new occupations and jobs; how does it adjust to the weakening and/or disappearance of traditional occupations and jobs? In some European countries we can observe that the number of IVET qualifications have dropped during the last two decades (exemplified⁽⁴⁾ by Germany where the number was reduced from more than 600 in the 1980s to 345 in 2013), reflecting changing labour market structures and requirements. The study needs to address this interaction between VET and the labour market and to illustrate how occupational change influences VET-change. Third, national policies and priorities will have a direct impact on developments of the VET sub-sector. High ambitions on behalf of the university sector (illustrated by the EU target of 40% of all 30-34 year old in tertiary education by 2020) exemplify an approach which may directly influence the recruitment to and position of VET. The impact of overarching policies on the VET sector will vary considerably between the EU Member states; VET developments in the 'new' member states joining from 2004 and onwards are of particular interest.

⁴ Spoettl, G. and Windelband, L. (2013): *Innovations in VET – a successful paradigm shift within the Dual System in Germany*. ITB Forschungsberichte 52/2013. Bremen

2.1.3 Initial VET at upper secondary level – a sector in decline?

In the 28 countries now members of the European Union, some statistical sources indicate that the proportion of upper secondary education students enrolled in vocational programmes has dropped from more than 60% in 2000 to less than 50% in 2013. According to UNESCO⁽⁵⁾, Europe seems to be part of a global tendency⁽⁶⁾ where the proportion of initial VET students has dropped consistently since 1999. In Europe, this apparent decline has taken place in a period where significant efforts have been made to strengthen the overall position of vocational education and training relative to other parts of the education and training system. The Copenhagen process (2002) and the European Alliance for Apprenticeships (2014) are the most important examples of efforts to move VET higher up on the political agenda and to unleash its potential. Signalling a new phase of the Copenhagen process, the 2010 Bruges and Riga communiqués launched clearer joint priorities by introducing short-term deliverables. At the same time, the economic crisis and high (youth) unemployment has put apprenticeship and other forms of work based learning at centre stage.

Despite the renewed attention for VET, the relative decline in enrolment has continued in a number of countries. This is frequently explained as a result of low status and esteem: VET is seen by many students (and their parents) as a second choice, inferior to general and academic education. Even in countries where VET traditionally has enjoyed a strong position, the perception of it as a low status, ‘dead-end-option’ is widespread. The relative decline of VET compared to other parts of the education and training system can be understood as a threat to the overall effectiveness of education and training systems, potentially undermining their ability to deliver – to society and economy - an appropriate mix of theoretical knowledge, practical skills and general competences⁽⁷⁾. The seriousness of this threat, and whether it reflects a reality at national level⁽⁸⁾, can only be understood through a careful analysis of developments at that level. The study should analyse how initial VET at this level has developed since the 1990. Given that European statistics in some cases are unable to capture long term developments, this will require a detailed analysis of national data regarding enrolment and completion rates. These data can demonstrate how the profile and structure of IVET systems have developed over time. This should be followed by an analysis of the main VET delivery forms and how these have evolved, providing the basis for a discussion of the training and learning ‘philosophies’ underpinning VET. While much of this material is already available in Cedefop, the study should approach the data from the perspective of change, and seek to capture the (different) dynamics in the national IVET systems.

2.1.4 ‘From cradle to grave’ - VET as lifelong learning

Understanding the changing nature and role of VET requires a focus on lifelong learning and on how vocational knowledge, skills and competences could operate on a ‘cradle to grave’ basis. An isolated focus on initial VET (for example exclusively addressing the age cohort 15-20 years of age) fails to observe the wider context in which VET operates and evolves. Two aspects are of

⁵ UNESCO (2015) *Unleashing the potential: Transforming technical vocational education and training*. UNESCO, Paris

⁶ The only exception being sub-Saharan Africa.

⁷ This is illustrated by Cedefop’s forecasts on skills needs. It is estimated that in 2025, 48% of job openings in Europe will require middle level qualifications – ISCED 3 and 4. This is a slight increase compared to 2013 when the percentage was 47.2. These middle level qualifications will to a large extent be vocationally oriented.

⁸ Statistics can be interpreted in different ways. Eurostat figures covering the period 2006-2012 point to a limited decline of approximately 6% (in total number of VET students) and 1,5% in overall proportion of upper secondary students.

particular importance for this analysis. First, and as Tesfaye⁽⁹⁾ claims for Denmark, practically oriented learning is rapidly losing ground in primary education. Tesfaye claims that traditionally important activities, for example linked to basic crafts like woodwork, textiles etc., have disappeared from the school curricula and have not been replaced by alternatives. This means that primary education is designed as a stepping stone to general upper secondary education and eventually to academic higher education, potentially under-communicating the prospects offered by VET. While it is unclear whether the Danish example is relevant also to other countries, the study should reflect on the role of primary/lower secondary education as stepping stones to VET. To what extent is this linkage explicit in the countries and how is it translated into concrete policies and practises? Second, the perception of initial VET as a 'dead-end-stream' may indicate that existing opportunities for Continuing VET (CVET) are unknown to potential users. While the emerging qualifications frameworks show some potential in this area, countries have only to a limited extent facilitated progression from initial VET into lifelong learning. Partly reflecting the extreme diversity of CVET, young VET learners will often be unaware of the existence of lifelong learning pathways. This also draws attention to the role of guidance and counselling services at this level; to what extent are they orienting students towards VET? The question of lifelong learning is complicated by the fact that a significant part of CVET is organised in the private sector by multiple providers. The fact that the CVET landscape is not transparent may discourage young people contemplating options from choosing VET and a career based on it. To understand the changing role of IVET at upper secondary level it is important to reflect on the extent to which progression is possible and known to learners. The question is also whether lifelong learning possibilities are promoted in a transparent way and whether efforts have been made to convey this to potential candidates?

2.1.5 VET at higher education levels

The changing nature and role of VET is intrinsically linked to changes in tertiary education and the study should clarify how higher education institutions respond to the needs of the labour market.

2.1.5.1 'Academic drift' - the institutional 'upgrading' of VET

Previous studies⁽¹⁰⁾ demonstrate that the Cedefop definition of VET captures education programmes and qualifications delivered by institutions at post-secondary and tertiary level. The study of qualifications at EQF level 5, for example, shows that a significant part of these qualifications are directly related to occupations and the labour market and explicitly promote the combination of what and how, of knowledge, skills and competences. The same observation can be made for tertiary education at EQF levels 6-8 where education (and training) of professions (doctors, engineers, nurses, teachers, social workers, lawyers etc.) plays an important role. In a recent book, Smeby and Sutphen⁽¹¹⁾ point to a global tendency to 'upgrade' vocational education and training to higher, professional education - in particular in the fields of education, health and social work. This 'upgrading' can be seen as an 'academic drift' which potentially can change the institutional and content-character of a programme and a qualification. While academic drift is most visible as institutional change – for example by moving a particular education from the upper secondary to the tertiary level - the critical question is whether and how the content and didactics of these programmes is influenced by the 'upgrade'. The integration of training into tertiary education has in some cases been a conflicting process where practitioners and professional associations have argued for more practise based and practitioner-controlled training - warning against a development where the ideals of research and disciplinary oriented higher education are

⁹ Tesfaye, M. (2014): *Kloge Hænder. Et forsvar for håndverk og faglighed*. Gyldendal, Copenhagen

¹⁰ Cedefop (2014): *Qualifications at level 5 of the EQF*. Publications Office, Luxembourg

¹¹ Smeby, J.C. and Sutphen, M.: *From vocational to professional education*. Routledge, London

uncritically adopted. To understand the changing role of VET requires an understanding of these processes: To what extent can this academic drift be identified at national level; which form does this tendency take, politically and institutionally; which are the implications for the content and delivery of VET at these levels?

2.1.5.2 'Vocational drift' - reclaiming VET at tertiary level

While the academic drift described above can potentially dilute what we have described above as the essence of VET - a strong labour market focus based on a combination of theoretical and practical learning - other developments in tertiary education can be understood as efforts to 'reclaim' and strengthen VET-principles. In recent years we have seen the introduction of tertiary programs consistently and deliberately combining academic studies with applied learning in the professional world, systematically doing this in cooperation with enterprises. Students will, as is the case in the German 'Berufsakademien', alternate between university education and on-the-job training, giving them the opportunity to apply concepts learnt in class to practice and vice-versa bring in new ideas from their work placements into the classroom. This approach implies that companies are treated as (more) equal partners to the university and participate in a continuous development of what can be described as a 'dual study concept'. Resulting from increased cooperation between higher education and businesses, this 'vocational drift' can now be identified in a number of European countries, promoting the combination of theoretical and practical learning as a major strength for tertiary institutions. To understand the changing role and nature of VET in Europe it is essential to understand these processes: To which extent is this 'vocational drift' taking place; which forms does it take; and which are the implications for the content and delivery of programmes and qualifications?

2.1.6 Threats or opportunities – which are the scenarios for the 21st century

The study, based on the analysis and synthesis of the above aspects, should develop scenarios identifying the characteristics of European VET for the 21st century. Taking as its starting point that VET needs to be seen as an integrated part of the overall education and training and lifelong learning system and be able to reflect the requirements of the labour market and society, these scenarios can help to identify different development alternatives, particularly addressing the need for institutional reform and pedagogical and didactical development.

2.2 Objective, purpose and expected results

2.2.1 Overall objective

The overall purpose of the study is to improve our understanding of how European vocational education and training (VET) is changing. The study takes as its starting point that traditional VET at upper secondary level is under considerable pressure, in terms of enrolment and status, in some countries. At the same time we observe that vocationally oriented education and training is frequently (increasingly?) delivered by institutions outside the traditional VET sector – for example at tertiary level - pointing towards a broader and more diverse definition of VET being applied. A key objective of the study, based on a mapping of developments during the last two decades, is to analyse these changes, taking into account factors internal as well as external to the education and training system.

2.2.2 Purpose

The detailed purpose of the study is to map and analyse the following interconnected areas:

- The study should address the definition of vocational education and training and how this is understood and applied at national level.
- The study should analyse how external factors influence vocationally oriented education and training at national level, notably by addressing demographic developments, labour market developments and policy orientations.
- The study should analyse how initial VET at upper secondary level (EQF levels 3-4) has developed in the 28 MS of the EU (+ Iceland and Norway) in the last two decades by providing an overview of enrolment and completion rates, by analysing the changes in structure and profile and by identifying the main delivery forms (see point 2.1.1).
- The study should analyse VET from a lifelong learning perspective by reflecting on the role of primary and lower secondary education as stepping stones and motivators to VET (see point 2.1.4).
- The study should map and analyse the role of VET in higher education by reflecting on the issues 'academic' and 'vocational drift' (see point 2.1.5).
- The study should develop a limited set of scenarios outlining alternative development paths for European VET in the 21st century (see point 2.1.6).

2.2.3 Results to be achieved and research questions to be answered

A main purpose of the study is to understand the way European VET systems are changing. The study should for this reason provide a picture of developments in the last two decades (1995-2015). This perspective is important as it allows for a reflection of the pace of change and the relative stability of national VET systems. Given the high numbers of countries to be addressed, and the period to be covered, the study should adopt a sequenced research strategy where existing data at European level (Cedefop, Eurostat, others) are used as a starting point informing additional and complementary research at national level. The following blocks of research questions will underpin the study.

Work Assignment 1 - Defining VET

It is assumed that the definition and understanding of VET will influence political, institutional and didactic choices (see also point 2.1.1). The following questions address this:

- How is vocational education and training defined at national level and has this definition changed in the period covered by the study?
- Which are the implications, for policies, institutional structures and learning approaches at national level, of the definition of VET?

Work Assignment 2 - The external factors influencing VET

VET is not evolving in a vacuum but is influenced by factors outside the education and training system (see also point 2.1.2). The following questions orient research on these factors:

- To which extent are demographic developments influencing the need for and provision of VET?
- To what extent are changes in the labour market, and notably occupational profiles, influencing VET?
- To what extent are changes in VET based on targeted labour market intelligence, for example on skills needs analysis at national/regional, sectoral or local level)?
- To what extent is the role and nature influenced by changing policy priorities at national level?

Work Assignment 3 - The changing role of initial VET at upper secondary level

Developments of IVET at upper secondary level provide a reference point for the study and the following questions need to be addressed at national level (see also point 2.1.3):

- How has enrolment in and completion of initial VET at upper secondary level developed in the last two decades?
- What proportion of upper-secondary students attends VET courses and how has it evolved?
- Which qualifications are delivered and which occupational areas are covered by VET and how has this changed in the last two decades?
- Which are the main delivery forms of IVET and how has this changed during the period?

Work Assignment 4 - VET as lifelong learning

VET must be understood in a lifelong learning perspective, from cradle to grave, and the following questions need to be addressed at national level (see also point 2.1.4):

- To which extent have primary and lower secondary educational objectives and curricula been aligned to and designed towards the needs of VET?
- What is the role of guidance in supporting lifelong VET learning?
- Which are the main characteristics of the national CVET-sector, in terms of size and orientation?
- To what extent is continuing training explicitly and visibly linked to and building on IVET?

Work Assignment 5 - VET in higher education

The expansion of VET into higher education is noticeable in many countries and may point towards a future model where the inherent qualities of VET, as expressed in its definition, are delivered at all qualifications levels and by a broader range of institutions. This development can take different forms and the following questions can be asked (see also point 2.1.5):

- To what extent can 'academic drift' (as explained in 2.1.5.1) be identified at national level and which form does this take?
- Which are the implications of 'academic drift' for the content and delivery of VET at these levels?
- To which extent is 'vocational drift' (as explained in 2.1.5.2) taking place; which forms does it take; and which are the implications for the content and delivery of programmes and qualifications?

Work Assignment 6 - Synthesis and VET Scenarios for the future

A key challenge for the study is to bring together the findings of the different assignments in a way which brings overview and contributes to in-depth understanding of the challenges faced by VET. A key challenge is furthermore to build on and compare the different national developments and trends and to synthesise these in a way which demonstrates European challenges and opportunities (see also point 2.1.6). Supporting this synthesis-building, the following questions are asked:

- Is European VET under threat or merely undergoing a change as regards its institutional and structural basis?
- Which alternative scenarios for European VET can be identified?

The study will interact with and be supported by the ongoing work of Cedefop on VET developments, for example policy monitoring and reporting. A detailed cooperation plan will be agreed in the inception phase. A systematic sharing and exchange of data will be necessary and expected during the research period and the Cedefop documentation and research support will be actively involved. Given that the various assignments are different in character and orientation, also a mixture of qualitative and quantitative methodologies has to be used. These methodologies should be applied in a way which demonstrates development and evolution over time and at different institutional and geographical levels. The methodological approach should be indicated for each separate assignment as well as for the overall synthesis.

2.3 Reports

The following reports in English will be submitted. All deliverables should be shared with Cedefop in draft stages before they are delivered as final. Copies of the reports referred to must be submitted to the Project manager identified in the contract. The final deliverables have to be compiled according to Cedefop's style manual (see Annex K).

2.3.1 Reporting requirements per work assignment

- (i) An Inception Report is due 2 months after the date on which the order form for the specific work assignment is signed by the last contracting party. It will refine and specify the methodology proposed, provide an initial timetable and clarify expected outputs for the assignment in question. Cedefop will provide comments on the inception report. The Contractor should address those comments, liaising closely with Cedefop's project manager.
- (ii) An Interim Report will be required for each separate assignment, approximately in the middle of its execution. The exact date will be indicated in the order form for each work assignment. The interim report for the assignments should include:
 - An overview over initial findings in the countries covered by the assignment. This overview should indicate the way data will be structured and presented in the final report
 - An initial analysis of these data in accordance with the questions listed in chapter 2.2.3 above
 - An indication of the quality assurance mechanisms put in place in relation to data-collection and analysis.

Cedefop will provide comments on the Interim reports. The Contractor should address those comments in view of the preparation of the draft synthesis report, liaising closely with Cedefop's project manager.

- (iii) **A draft final report for each of the work assignments 1 to 5** will be submitted to Cedefop 2 months before the expiration of each order form/work assignment. The exact date will be indicated in the order form for each work assignment. The final report will contain an executive summary possible to be published separately.

Only for Work Assignment 6, a draft final report covering:

- a) the findings of WA 6 as well as an executive summary possible to be published separately
- b) the overall results of all work assignments 1 to 6 including an executive summary possible to be published separately.

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

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

The selected Contractor shall ensure that the final report(s) as submitted to Cedefop has (have) been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (see Annex H – Table 1, item 2e and Tables 2 to 6 item 2d).

2.4 Meetings and Travel expenses

The Contractor will be requested to attend the following one-day meetings at Cedefop premises with the project manager(s) responsible:

- 2.4.1 A kick-off meeting, 1-day with 3 persons of the Contractor at Cedefop Brussels office, within four weeks after the signature of the 1st order form for work assignment 1, in order to:
- a) to fine-tune the study methodology for all work assignments 1 to 6
 - b) to fine-tune the methodology in view of the preparation of the inception report of work assignment 1.

This meeting will occur only once.

- 2.4.2 Meetings with 2 persons of the Contractor at Cedefop Brussels office, within one month following the submission of interim reports for the (6) assignments, in order to discuss the progress, data collection and the way forward (6 one-day meetings in total – Brussels premises).

- 2.4.3 (a) Meetings with 2 persons of the Contractor at Cedefop premises in Thessaloniki, immediately following the submission of the draft final reports for each of the work assignments 1 to 5 to discuss and improve the final outcomes and key policy messages included in the draft final report (5 one-day meetings in total - Thessaloniki premises).
- (b) In addition to the above and only after submission of the draft final report for work assignment 6, a one-day meeting with 3 persons from the Contractor will take place at Thessaloniki premises to discuss and improve the final outcomes and key policy messages included in the draft final report and additionally discuss the overall findings of work assignments 1 to 6 .

In total the Contractor will be requested to attend **13 meetings**. All costs incurred, including travel & accommodation related to Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described above, have to be included in the Financial proposal (see table in point 5.4, item 2a).

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

3 SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1 Exclusion criteria

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

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

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

3.2 Selection criteria

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

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

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

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

3.2.1 Economic and Financial capacity

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

Requirement:

The average annual turnover of the tenderer for the last three (2012, 2013, 2014) financial years concerning the type of services covered in this call for tenders should be at least **600,000 €**.

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

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

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

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

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

3.2.2 Technical and professional capacity

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

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

Requirements:

- The tenderer must have adequate experience in the field of research and comparative analysis on labour market and/or vocational education and training at European level, having performed **contracts** with a total minimum contract value of **600,000 Euro** during the last three (3) years (to have been concluded by the deadline of submission of offers).
- The Tenderer's **KEY** experts, whose involvement will be instrumental for the implementation of the contract, must have the relevant to the subject of the contract profiles, knowledge and experience for its successful implementation.

Key expert 1: Project Leader(s) (minimum 1 member)

Requirements:

- A University degree ;
- At least five (5) years' experience of leading and organising a team of experts;
- At least five (5) years' experience of running European and/or international research projects together with a team of international experts;
- A minimum of five (5) years of experience in comparative analysis of (vocational) education and training at European and/or international level;
- Knowledge of vocational education and training systems and developments in Europe, conceptually and empirically, proven by relevant publications and involvement in projects;

- Knowledge of the relationship between European and/or international education and training systems and the labour market, proven by relevant publications and involvement in projects;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”⁽¹²⁾).

Key experts 2: Project team members (minimum 5 members)

Members of the core project team have a crucial role in implementing the contract; they must fulfil the following minimum requirements:

- A University degree
- At least three (3) years’ involvement in a coordinating role in European and/or international research projects;
- At least three (3) years’ experience working in comparative analysis of vocational education and training at European and/or international level;
- Knowledge of empirical research methodologies and qualitative and quantitative data analysis, including related technologies, proven by involvement in relevant projects;
- Analytical skills with regard to qualitative and quantitative information, proven by participation in statistics-based projects;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Key experts 3: Country experts

These experts must fulfil the following requirements related to the education and training system of their country or a relevant area:

- Minimum three (3) years individual experience in policy analysis and/or comparative research in the fields of education, training and/or employment, proven by involvement in projects and publications;
- Relevant knowledge and experience with regard to policies, strategies and practices concerning vocational education and training, proven by involvement in relevant projects;
- Knowledge of the education and training system of the relevant country, proven by relevant publications or involvement in project;
- Languages: Linguistic ability to communicate and draft in English (Level B2 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

¹² <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

Proof / Evidence of Technical and professional capacity

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

- Brief company profile (**please fill-in Questionnaire 4 in Annex G**) with clear reference to its experience and expertise in the field areas of the study;
- List of at least **3** contracts performed in the past **three (3)** years in the field of research and comparative analysis on labour market and/or vocational education and training at European level, describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Questionnaire 3 in Annex G**);
- The Europass curriculum vitae format (<http://europass.cedefop.europa.eu>) or similar format shall be filled in by each person involved in the execution of the tasks foreseen in the tender. CVs must clearly specify at the top the role(s) of the expert in the team. **Each CV must include a brief Annex synthesising information aimed at demonstrating the professional capacity of the team member as above requested.** In particular the Annex should clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, and main activities and responsibilities), and clearly present the linguistic abilities, in particular in English. The CV of the project leader should also include a list of publications relevant to the subject of the call, to which the proposed team member has participated.

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

3.3 Legal Position

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

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

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

4 ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

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

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

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

4.1 Joint Offers/ Groupings (Consortia)

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

- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

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

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

4.2 Subcontracting/Subcontractors

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

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

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

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

Only in cases when:

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

the tenderer should submit with the offer:

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

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

5 AWARD OF THE CONTRACT

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

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

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

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

Whereby:

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

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

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

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

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

5.1 Technical evaluation

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

The following Award Criteria for the technical evaluation will be applied to this tender procedure:

- **Award criterion 1 – The level of understanding of the nature of the assignments, its context and results to be achieved (40 points)**
 - Demonstration of an in depth knowledge and of understanding of the assignments and their objectives (20 points);
 - The level of understanding of the overall education, training and labour market context in which the VET systems evolve and change (20 points).
- **Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (30 points)**
 - Relevance and soundness of the comparative methodological approach proposed for carrying out the tasks in the assignments (15 points);
 - The level of understanding of the methodological and research challenges involved in the assignments (15 points).

➤ **Award criterion 3 – The organisation and management arrangements (30 points)**

- Allocation of tasks, type and degree of involvement of the proposed experts (15 points);
- Project organisation and mechanisms to guarantee successful and on-time delivery of the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (15 points).

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

5.2 Technical proposal

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

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

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

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

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

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project.

More specifically, and related to the three awarding criteria, the following information should be included:

For award criterion 1

- Discussion of the changing nature and role of vocational education and training in Europe.
- Discussion of the methodological and research challenges involved in the assignments, especially in relation to the context in which the VET systems evolve and change.

For award criterion 2

- A clear presentation of the research methodology, its strengths as well as its limitations.

- Discussion on the level of understanding of the interaction between sub-sectors of education and training type of data required and the challenges involved in reaching relevant stakeholders (in education as well as in the labour market).

For award criterion 3

- A detailed work plan illustrating intended organisation and management of the tasks and human resources.
- Description of deliverables including a clear timetable, the challenges and an assessment of risks involved in carrying out the project.

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

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

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

5.3 Financial proposal / Financial Scenario

Tenderers should not disclose their financial offer (or parts of it) in any part of their tender (technical proposal, cover letter) other than the sealed envelope C.

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

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities indicated in the Terms of Reference for each work assignment. The tenderers must fill in the 6 “Price Schedule Tables” (one per assignment) that are to be found in Annex H and present a detailed breakdown of the price offered. All services that shall be procured should be included. Tenderers must fill-in all 6 tables. Failure to fill-in all 6 tables will lead to rejection of your offer. In the last table (nr 6) there is also an extra table (Total Tenderer’s offer) with the total sum/price resulting of the 6 financial tables that will be taken into account for the financial evaluation (see point 5.4 below).

The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5) - please note however that Cedefop estimates are indicative and do not constitute any kind of legal obligation for the Centre.

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

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, **the unit price as quoted** will be the price taken into account. Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

5.4 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the Total Tenderer's offer as described in point 5.3 and presented in Annex H.

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

*Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) * Y*

Y = price weighting (see the complete formula under point 5 above)

Information concerning price

- The prices quoted must be fixed and is not revisable.
- Prices must be quoted in EURO and include all expenses.
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.
 - For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.
 - For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.
 - In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".

6 INFORMATION ON PRESENTATION AND CONTENT OF TENDER

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

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

6.1 Envelope A - Supporting documents

One original and one copy of:

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

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

6.2 Envelope B – Technical proposal

One original signed version and three copies of:

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

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal containing all information requested in point 5.4 and the 6 tables as given in Annex H.

ANNEX A

Contract Notice

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

ANNEX B

Draft Contract

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

ANNEX C

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

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

ANNEX D

Legal Entity Form

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

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

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

ANNEX E

Financial Identification Form

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

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

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

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

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

ANNEX G

Questionnaires 1-4

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

ANNEX H

FINANCIAL OFFER TABLES

(Given as a separate 6 tables in .doc file)

ANNEX I

Models of power of attorney

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

ANNEX J

Model of Letter of Intent for Subcontractor/s

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

ANNEX K

CEDEFOP STYLE MANUAL

(Given as a separate Excel file)