2. TERMS OF REFERENCE

The purpose of this Cedefop study is to support the in-depth analysis of how two key competences – (a) language(s) and (b) digital – are integrated and promoted in initial VET through a variety of policies, principles and tools, including qualifications frameworks, occupational and educational standards, curricula, and assessment standards.

The following sections exemplify issues that should be addressed by the study.

2.1. Definitions

Key competences

A competence is the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development (²). Its broader definition may include and/or combine notions of attitudes, abilities, know-how, capacity, capability and aptitude (³).

Key competences are those which all individuals need for personal fulfilment and development, active citizenship, social inclusion and employment. The 2006 European framework for key competences for lifelong learning adopted by the European Parliament and the Council recommendation defines eight key competences (⁴) that may complement or overlap with 21ˢᵗ century skills, OECD key competencies, ILO core competencies, basic (⁵) and new basic (⁶) skills needed to live in contemporary knowledge society, 'fundamental basic skills' (language, literacy, numeracy and ICT) and 'transversal key competences' such as initiative-taking and cultural awareness (⁷).

In VET, the distinctive feature of key competences is that they are not directly relevant to a certain qualification but have the ability to be used flexibly in different situations, for further learning and in the labour market. However, the key competences in many cases overlap with those directly linked to a specific sector/occupation. For example, using foreign languages may not be routine for road construction technicians, whereas most qualifications in the tourism industry require knowledge of one or more foreign languages. For the former, a foreign language is a key competence *sensu stricto*; for the latter, it may be as well a key competence that overlaps with a vocational competence.

Languages

In this call for tenders, languages refer to literacy in the mother tongue and foreign languages, thus reflecting Europe's multicultural and multilingual reality. Literacy is understood in its wider meaning of proper language acquisition and use (with a focus on reading and writing forms), and learning other languages.

In the 2006 key competences framework:

> '**communication in the mother tongue** *is defined as the ability to express and interpret concepts, thoughts, feelings, facts and opinions in both oral and written form (listening, speaking, reading and writing), and to interact linguistically in an appropriate and creative way in a full range of societal and cultural contexts; in education and training, work, home and leisure;*

(²) Source: EQF recommendation 2017 (p.14); http://data.consilium.europa.eu/doc/document/ST-9620-2017-INIT/en/pdf

(³) Gábor Halász and Alain Michel, "Key Competences in Europe: Interpretation, Policy Formulation and Implementation," *European Journal of Education* 46, no. 3 (2011): 289–306, doi:10.1111/j.1465-3435.2011.01491.x.

(⁴) The 2017 review of the framework may redefine key competences.

(⁵) Listening, speaking, reading, writing and mathematics [Source: Cedefop (2014). Terminology of European education and training policy – A selection of 130 key terms. Luxembourg: Publications office].

(⁶) IT skills, foreign languages, technological culture, entrepreneurship and social skills [Source: Council of the European Union (2002). Resolution on lifelong learning (2002/C 163/01)].

(⁷) Council conclusions of 11 May 2010 on competences supporting lifelong learning and the 'new skills for new jobs' initiative.

communication in foreign languages broadly shares the main skill dimensions of communication in the mother tongue: it is based on the ability to understand, express and interpret concepts, thoughts, feelings, facts and opinions in both oral and written form (listening, speaking, reading and writing) in an appropriate range of societal and cultural contexts (in education and training, work, home and leisure) according to one's wants or needs. Communication in foreign languages also calls for skills such as mediation and intercultural understanding.'

The common European framework of reference for languages: learning, teaching, assessment (CEFR) accompanies scales of foreign language proficiency by a detailed analysis of communicative contexts, themes, tasks and purposes as well as scaled descriptions of the competences on which people draw when communicate.

Digital competence

The key components of digital competence are ([8]):
1) information and data literacy,
2) communication and collaboration,
3) digital content creation,
4) safety,
5) problem solving.

Curriculum

In this call for tenders, curriculum is understood as inventory of activities related to the design, organisation and planning of an education or training action, including definition of learning objectives, content, methods (including assessment) and material, as well as arrangements for training teachers and trainers ([9]).

2.2. Policy background

For VET learners to adapt to new life situations and career shifts, manage change, take initiative and risk, innovate, and engage in further learning, purely occupation-specific skills are not enough; they also require key competences. According to Eurobarometer, most EU citizens consider basic skills – which overlap with key competences – as the most important skills that VET provides.

Ensuring that key competences are adequately integrated in initial VET curricula is one of the aims of the Bruges communiqué which defined the strategic objectives for VET until 2020.

Cedefop's monitoring report found that 'key competences have received increased attention in recently reformed outcomes based initial VET curricula and standards, and are included in the NQF [national qualifications frameworks'] level descriptors in more than half of the EU+ countries. Increasingly, countries include the chance for youth and adults to make up for basic skills deficits in their lifelong learning and VET strategies and their VET offers'. While key competences in VET were one of the deliverables for the period 2011-14,the Riga conclusions (2015) continue seeking more effective opportunities to acquire or develop these competences through VET ([10]). The reviewed set of the ET2020 priority areas pays particular attention to relevant and high-quality skills and competences for employability, innovation and active citizenship through modernisation of VET.

The European Commission is currently reviewing the 2006 EU key competence framework as part of the new skills agenda for Europe. Cedefop's RefNet series of reports (2016) supported the review by providing basic data on national approaches to, and opportunities for acquisition of key competences in upper secondary and mainly school-based VET in the EU+ countries.

([8]) Source: European Commission's digital competence framework (DigComp 2.0), https://ec.europa.eu/jrc/en/digcomp/digital-competence-framework
([9]) Source: http://www.cedefop.europa.eu/en/publications-and-resources/publications/4117
([10]) See medium-term deliverable 4.

Preliminary observations show that most EU+ countries have in place measures promoting key competences, including mother tongue, foreign languages, and digital competences. However, promoting key competences is seldom monitored.

In 2012, the Commission provided policy guidance on assessing key competences in initial education and training as part of the rethinking education initiative. It concludes that defining key competences as tangible learning outcomes still needs to be fully explored.

In this study, language(s) and digital competences are selected for analysis.

Acquiring the language competences needed for successful mobility and employment may be difficult, as language learning is not necessarily compulsory in all countries or types of VET. The ET2020 working group reported that the 'challenge is not necessarily about increasing curriculum time but increasing the effectiveness of teaching and learning'.

Another ET2020 working group looked at conditions for successful comprehensive policies to enhance learners' and educators' digital competences. It focused on data collection and monitoring, governance issues and cross-sectoral cooperation. It also guided the development of an EU communication on opening up education. To attract more young people into ICT education and to retrain unemployed people, the EC launched the grand coalition for digital jobs (2013) that facilitates collaboration between public and private actors.

2.3. Aims and objectives

The overall aim of the call is to contribute to continuous learning in VET policy development within priorities and commitments of Bruges communiqué and Riga conclusions ([11]) through a study that will:
- advance knowledge of existing policies on selected key competences in initial VET in the EU+ countries;
- inform research in relation to the content of standards and qualifications;
- feed into Cedefop's work on NQF level descriptors;
- inform discussions on benefits for initial VET at national level, also based on policies of other EU+ countries;
- increase stakeholder participation in the debate on key competences in VET;
- feed into the final report on progress of the 2015-20 Riga medium-term deliverables.

2.4. Scope of the research

The study will analyse in depth two selected key competences:
- language(s);
- digital competence.

Selection of these key competences is determined by their topicality.

Geographical coverage of the research:
- EU countries ([12]), NO and IS (hereinafter – EU+ countries);
- in addition to synthesis for EU+ countries, each country to be analysed separately;

VET levels to be analysed:
- EQF levels 3, 4 and 5, with main focus on upper secondary initial VET (see European inventory on national qualifications frameworks for details);

Forms of learning to be analysed:

([11]) Medium term deliverable 4: Further strengthen key competences in VET curricula and provide more effective opportunities to acquire or develop those skills through initial and continuing VET.
([12]) The UK and Belgium have multiple VET systems that will be analysed separately.

- school-based, including work-based learning in school workshops/laboratories;
- work-based (in-company training);

Policy levels to be analysed:
- the study will cover mainly EU, national/regional policies and practices but also developments at local (provider) level;

Reference period:
- 2011-18; analysis may go beyond 2011-18, should it help explain developments in the reporting period.

2.5. Research questions

The key research questions to be addressed in the study are:

1. How have policies promoted key competences in initial VET since 2011?
   a. What are the 2020 national policy objectives in relation to key competences?
   b. Which national policies related (but not limited) to curricula, occupational and educational standards, qualifications, programmes, learning outcomes and teachers and trainers have been implemented since 2011?
   c. How have broader EU objectives translated into these national policies (if at all)?

2. How the selected key competences are embedded in initial VET?
   a. How have national policies translated into occupational and educational standards, curricula and programmes, assessment standards (if at all)?
   b. How are the selected key competences being assessed (if at all)?
   c. How is learning organised to promote key competences?
   d. How do the selected key competences support the development of other competences (key and vocational) and personalised and collaborative learning?
   e. How do the selected key competences support lifelong learning, employability and mobility?

3. To what extent has promoting key competences in VET been effective and efficient at national/EU level?
   a. What are the links between national policy objectives (defined in 2011-15) in relation to key competences and their actual implementation until 2018? Was everything that had been planned implemented? If not, what are the reasons?
   b. How do existing policies (national and EU) and practices add value to promoting key competences in VET (if at all)?
   c. Which national policies or practices have failed and why?

2.6. Methodology and tasks

The study will adopt a comparative and qualitative approach. The contractor will use descriptive research comprising desk research (literature, policy documents and curricula), expert interviews and/or focus groups and case studies to achieve the study objectives.

In order to answer the research questions, the contractor will carry out the following tasks:

Task 1: Development of analytical framework and research tools
The contractor will design a robust analytical framework and research tools for the collection and analysis of data, in particular, for mapping and analysing 2020 national policy objectives, national policies related (but not limited) to curricula, occupational and educational standards, qualifications, programmes, learning outcomes and teachers and trainers implemented since 2011, VET standards and curricula for the selected sectors/programmes, learning outcomes' assessment, occupational and educational standards, qualifications, programmes and learning outcomes, policy impact evaluation, including at least the identification and analysis of

effectiveness and efficiency of policies promoting key competences in VET, links between national policy objectives 2011-15 and their actual implementation.

The contractor will propose the means for carrying out eight (8) in-depth case studies (see Task 4) that aim at analysing national policies that have (initially) failed, reasons that had led to such an outcome and remedies applied.

Task 2: Defining state of play (policy and curricula) of selected key competences in initial VET in EU+

Task 2.1. The contractor will research **policies** that have promoted key competences in initial VET in each EU+ country in 2011-18, for example related (but not limited) to curricula, occupational and educational standards, qualifications, programmes, learning outcomes and teachers and trainers. Policies include guiding principles (guidelines), rules (legislation and procedures), strategies, plans, action programmes and measures/initiatives/pilots. The task requires:
  • mapping the 2020 national policy objectives and their analysis across EU+;
  • describing in detail how have the national policies related (but not limited) to curricula, occupational and educational standards, qualifications, programmes, learning outcomes and teachers and trainers been implemented to promote the selected key competences in initial VET in 2011-18;
  • analysing how have broader EU objectives translated into these national policies.

Task 2.2. This is a core task for the study. The contractor will research how have national policies been translated into occupational and educational standards, curricula and programmes, assessment standards and how are the selected key competences being assessed in the curricula. It will also analyse how learning is organised to promote key competences, for example, as stand-alone modules/subjects, integrated/embedded learning outcomes or as a mix of both. The contractor will analyse how the selected key competences support the development of other competences and personalised and collaborative learning as well as lifelong learning, employability and mobility.

The contractor will research VET curricula (in a broader sense), including programmes, tools and principles supporting the implementation of each key competence in the national VET systems.

Curricula (in a narrow sense) analysis will comprise a minimum of three VET programmes per country ([13]). At least one programme will be work-based and include in-company training, where it exists. For comparability reasons, three sectors will be agreed with Cedefop. VET programmes will be selected within these sectors in every EU+ country.

	VET programme 1 (within sector 1)	VET programme 2 (within sector 2)	VET programme 3 (within sector 3)
Language(s)	✔ competence is directly linked to qualification	✘ competence is not linked to qualification	✘ competence is not linked to qualification
Digital competence	✘ competence is not linked to qualification	✔ competence is directly linked to qualification	✘ competence is not linked to qualification

NB: To ensure comparability of apprenticeship or work-based (including in-company training) programmes, they will be mainly in one sector.

([13]) The UK and Belgium have multiple VET systems that will be analysed separately.

The contractor will compare characteristics of the two key competences by programme type (¹⁴) within the country and across EU+.

At least three (3) focus groups (or interviews) per country with relevant stakeholders from VET sector (including representative(s) working with apprenticeships) at policy making <u>and</u> implementation (practitioner) level will be conducted by the contractor to gather important contextual information and validate analysis results; other means of collecting information will be proposed by the contractor.

Task 3: Evaluating the 2011-18 policy impact
The contractor will research the effectiveness and efficiency of policies that aim(ed) at promoting the selected key competences in initial VET at national/EU level. The contractor will identify and analyse links between national policy objectives (defined in 2011-15) and their actual implementation until 2018. It will research how existing policies (national and EU) and practices add value to promoting key competences in VET.

Task 4: Carrying out and analysing eight (8) case studies
Each of eight (8) case studies will present one national policy that was designed to promote key competences in initial VET in one of the EU+ countries and had (initially) failed to reach its objective(s). The case study will research in detail reasons for failure and how this has been treated. The proposed research methodology will indicate criteria for the selection of case studies within the limit of maximum one case study per country. The preliminary discussion on case studies to be examined will be made in the inception meeting and the final in the interim meeting with the agreement of Cedefop's project manager(s) responsible for this project.

2.7. Reporting requirements

The contractor will submit all reports in English. All deliverables should be shared with Cedefop in the draft stages before they are delivered as final ones to Cedefop. Cedefop will provide comments to all deliverables. The final deliverables have to be drafted according to Cedefop's style manual. Reports will be checked for plagiarism.

(a) An **inception report** is due <u>six weeks</u> after the date of signature of the contract. It will contain:
- refined methodology proposed in the tender and proposal for research tools,
- description of the quality assurance mechanisms in relation to data collection and analysis,
- inputs and expected outputs and outcomes for the different steps of the study,
- proposal for sectors and refined criteria for selection of VET programmes,
- refined criteria for the selection of case studies,
- preliminary bibliographic references,
- refined timetable of the research and services to be provided.

Cedefop will provide comments on this inception report. The contractor should address these comments, liaising closely with Cedefop's project manager(s).

(b) The **first interim report** is due <u>six months</u> after the date of signature of the contract. It will include:
- complete literature review,
- the first draft of the analytical framework and research tools,
- a draft list of eight (8) case studies and plan for the case study fieldwork,
- a list of possible 90+ VET programmes (¹⁵) for curricula analysis,
- initial results for Task 2.1:

(¹⁴) Type 1: key competence in question is directly linked to a qualification; Type 2: key competence in question is NOT directly linked to a qualification.
(¹⁵) The UK and Belgium have multiple VET systems and therefore the number of actual programmes to be analysed will be higher.

    i.   mapping of the 2020 national policy objectives, including the EU+ comparative analysis,

    ii.   a list and detailed description of national policies that have been implemented to promote the selected key competences in initial VET in each EU+ country in 2011-18;

    iii.   analysis of how broader EU objectives have translated into the national policies promoting the selected key competences in initial VET in each EU+ country in 2011-18

- draft focus group (interview) guidelines for Task 2.2.

Cedefop will provide comments on this first interim report. The contractor should address these comments, liaising closely with Cedefop's project manager(s).

(c) The **second interim report** is due <u>14 (fourteen) months</u> after the date of signature of the contract. It will include:

- a robust analytical framework of the study,
- refined results for Task 2.1,
- initial results for Task 2.2 (core task for the study):
  - i.   analysis of the curricula of at least three initial VET programmes per country as well as occupational and educational standards, qualifications, programmes and learning outcomes;
  - ii.   comparative analysis of characteristics of the selected key competences by programme type within the country and across EU+;
  - iii.   analysis of how learning is organised to promote key competences in each EU+ country;
  - iv.   analysis of how the selected key competences support the development of other competences (key and vocational) and personalised and collaborative learning in VET;
  - v.   overview of how the selected key competences support lifelong learning, employability and mobility;
  - vi.   transcripts from the validation focus groups (or interviews);
- initial results for Task 3:
  - i.   analysis of the effectiveness and efficiency of policies that aim(ed) at promoting the selected key competences in initial VET at national/EU level;
  - ii.   analysis of the links between national policy objectives (defined in 2011-15) and their actual implementation until 2018, including the analysis of whether every policy that had been planned was implemented;
  - iii.   analysis of added value of policies (national and EU) to promoting key competences in VET;
- initial results for Task 4:
  - i.   eight (8) case studies' draft reports presenting one national policy that was designed to promote key competences in initial VET in one of the EU+ countries and had (initially) failed to reach its objective;
  - ii.   analysis of failure reasons and (possible) remedies;
- a complete list of data sources, including bibliographical data, references of people and institutions;
- information on challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;
- updated timetable for the completion of the remaining tasks.

Cedefop will provide comments on this second interim report. The contractor should address these comments, liaising closely with Cedefop's project manager(s).

(d) **Final report**. A draft final report will be submitted to Cedefop 19 months and a final report within 20 months of the date of signature of the contract. The report will include:

- introduction,

- executive summary, highlighting the main findings (approximately 10 pages), which can also be published as a self-standing document,
- a comparative analysis of developments and approaches, identifying trends and actions, gaps and challenges, and effectiveness/efficiency of policies and practices across EU+, illustrated with national examples embedded in the text,
- an in depth analysis of case studies,
- list of references,
- annexes:
  i. 30 country chapters (3-6 pages each) including at least baselines 2011 and 2015 and main developments until 2018, their impact on the two key competences in VET curricula, occupational and educational standards, qualifications, programmes, learning outcomes and policies; and conclusions;
  ii. detailed description of eight (8) case studies, including summary of main conclusions;
  iii. glossary of main terms;
  iv. list of abbreviations;
  v. full description of the methodology, analytical framework and research tools,
  vi. full set of data, including a list and detailed description of national policies and practices that have been implemented to promote the selected key competences in initial VET in each EU+ country in 2011-18.

Cedefop will provide comments on the draft final report and final report. The contractor should address these comments, liaising closely with Cedefop's project manager(s).

For all reports, lay-out and format of the text – in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (Annex H).

2.8. Exploitation of the results of the contract / anti-plagiarism checks

Tenderers are requested to read carefully the following articles of the draft contract (in Annex B of the procurement documents):

Article I.10 – Exploitation of the Results of the Contract
Article II.13 – Intellectual Property Rights
Article I.14.1 – Other Special Conditions, which complements the provisions of Article II.13 as regards the use of results of the research by the contractor
Article I.14.2 – Anti-plagiarism checks

2.9. Proof-reading & editing in English of the final report

The contractor will ensure that the final report as submitted to Cedefop has been subject to substantial language editing and copy-edit using the professional service of editor(s) - English native speaker(s) familiar with the subject, the cost for which will be included in the financial proposal (see also 2c) under point 5.4)

2.10. Networking with national stakeholders

The contractor is advised to assemble the team necessary to execute, manage and coordinate the study. Considering the complexity of the study, the contractor is advised to rely on a team of experts/consortia across different countries to carry out the analysis and validate the findings. In the different development stages, the contractor will be working in close collaboration with Cedefop's project manager(s) responsible for this project.

2.11. Meetings and travel expenses

The contractor (2 persons) will be requested to attend the following one-day meetings at Cedefop premises (in Thessaloniki) with the project manager(s) responsible:

- kick-off meeting (inception meeting) within four weeks after the signature of the contract to fine-tune the study methodology in view of the preparation of the inception report;
- meeting few days after the submission of the first interim report, in order to discuss the progress, data collection tools and ways forward;
- meeting few days after the submission of the second interim report, in order to discuss the progress, preliminary results;
- meeting immediately after the submission of the draft final report to discuss and improve the analysis and final outcomes of the study.

For quality assurance purposes and wide dissemination of study findings, Cedefop will hold an expert workshop to discuss and enrich the final research outcomes. This event will be organised by Cedefop. The contractor will be asked to support Cedefop in defining the workshop's agenda and identify potential audience and speakers. The contractor will also be asked to participate in this 2-day event with a maximum of 4 persons.

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 2a) and 2b) under point 5.4).

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

2.12. Deliverable/meeting timeline

The figure below summarises deliverables and meetings in a timeline. Please see points 2.7 and 2.11 for details.