



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 18/07/2008
RS/PRO/2008/775

OPEN INVITATION TO TENDER

AO/RPA/PDE-GUTCH/VETBenefits/017/08

ECONOMIC AND SOCIAL BENEFITS OF VOCATIONAL EDUCATION AND TRAINING

Dear Sir/Madam,

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

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

1. Tenders should be submitted in one of the official languages of the European Union.

2. Tenders may be submitted:

(a) either by post to be dispatched not later than 22/09/2008 in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

**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:

*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.

Do not attach your offer to the confirmation email or fax.

(b) or by courier service to be dispatched not later than 22/09/2008 in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaïdis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece**

Tel: +30 2310 490111

(c) or delivered by hand not later than 17:00 on 22/09/2008 to the following address:

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

In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery. Cedefop is open from 9.00 to 17:00, 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 style="text-align: center;">OPEN INVITATION TO TENDER</p> <p style="text-align: center;">CEDEFOP No: AO/RPA/PDE-GUTCH/VETBenefits/017/08</p> <p style="text-align: center;">ECONOMIC AND SOCIAL BENEFITS OF VOCATIONAL EDUCATION AND TRAINING</p> <p style="text-align: center;">Name of tenderer:</p> <p style="text-align: center;">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 point 7 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible so that there can be no doubt as to words and figures.
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 service 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 07/10/2008, 11.00 hours (local time). 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:

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 fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Request for additional information received less than five working days before the closing date for submission of tenders will not be processed.

- The contracting authority 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 tender.

Any additional information, including that referred to above, will be published on Cedefop's website. Please ensure that you visit regularly the site for updates.

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.

8. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful Tenderer.
9. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
10. 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. This decision must be substantiated and the tenderers notified.
11. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaïdis

Head of Finance and Procurement

Attached: Tendering Specifications

OPEN INVITATION TO TENDER

AO/RPA/PDE-GUTCH/VETBenefits/017/08

**ECONOMIC AND SOCIAL BENEFITS OF VOCATIONAL EDUCATION
AND TRAINING**

Tendering specifications

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INTRODUCTION TO CEDEFOP

The European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union. Created in 1975 with a tripartite Governing Board, it provides services for the European Commission, the European Union Member States and the social partners as well as for the associated countries of Norway and Iceland. The candidate countries are also associated with its activities.

As the European Union's reference centre for vocational education and training, Cedefop provides policymakers, researchers and practitioners with information to promote a clearer understanding of developments and so enable them to take informed decisions on future action. Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training.

The main tasks of Cedefop as defined in its founding Regulation are to:

- compile selected documentation and analysis of data;
- contribute to the development and coordination of research;
- exploit and disseminate useful information;
- encourage and support a concerted approach to vocational training development issues;
- provide a forum for a wide and diverse audience.

Cedefop's medium-term priorities for 2006-08 concentrate on the priorities set out in the Maastricht communiqué, which has been agreed by 32 countries, the European Commission and the European social partners:

- a) 'promoting the image and attractiveness of the vocational route for employers and individuals to increase participation in VET;
- b) achieving high levels of quality and innovation in VET systems to benefit all learners and make European VET globally competitive;
- c) linking VET with the knowledge economy's requirements for a highly skilled workforce and especially, because of the strong impact of demographic change, the upgrading and competence development of older workers;
- d) addressing the needs of the low-skilled (about 75 million people aged between 25 and 64 in the EU) and disadvantaged groups so as to achieve social cohesion and increase labour market participation.'

More information about Cedefop can be found on its website: <http://www.cedefop.europa.eu>.

1. OVERVIEW OF THIS TENDER

1.1. Description of the contract

Cedefop will offer single framework contracts (one for each lot) to the selected service providers/consortia to carry out specific research activities and studies on the economic and social benefits of vocational education and training (VET).

Framework contracts establish the basic terms for a series of specific studies to be concluded over a period of maximum 4 years (4 x 1 year), particularly as regards the subject, price and implementing conditions.

For each specific study, an order form will be issued by Cedefop. The order form and its annexes will stipulate the tasks to be performed by the contractors, the timetable, the budget, the human resources/experts to be allocated and, if necessary, the reports to be presented. For each study, the framework contractor will be contacted by email and invited to submit a specific proposal to Cedefop within 25 working days.

The activities and studies envisaged in the course of the framework contract will mainly contribute to Cedefop research on the economic and social benefits to VET (see description in '2. Technical specifications'). Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

In drawing up their bids, tenderers must take account of, and thus accept, the terms and conditions of the standard framework contract attached to the specifications (Annex B).

1.2. Place of delivery or performance

The tasks must be completed in the contractor's premises.

1.3. Division into lots

This invitation to tender is divided into the following 3 Lots:

Lot 1: Economic benefits of VET at macro-level and for social groups and communities

Lot 2: Social benefits of VET for individuals

Lot 3: Social benefits of VET at macro-level and for social groups and communities

Tenderers may submit tenders for one or more lots. However, a separate tender must be made for each lot.

Each lot will be examined and assessed separately and will lead to a separate framework contract with the successful tenderer.

1.4. Variants

Tenderers may not offer variant solutions to what is requested in the technical specifications. Please note that this does not apply to the methodological proposals.

1.5. Value of purchase

The following estimated total budget is foreseen for each lot over the entire duration of the framework contract (maximum 4 years).

	Total budget estimate for the whole lot	Study 1 (budget estimate)	Study 2 (budget estimate)	Any possible additional study (budget estimate)
Lot 1: Economic benefits of VET at macro-level and for social groups and communities	203,500€	185,000€	–	18,500€
Lot 2: Social benefits of VET for individuals	181,500€	143,000€	22,000€*	16,500€
Lot 3: Social benefits of VET at macro-level and for social groups and communities	194,700€	88,500€	88,500€	17,700€

*optional work package foreseen in Lot 2

The description of each lot contains detailed information about the work packages and calendar for each study foreseen by Cedefop. These specifications are different for each lot.

1.6. Validity of tenders

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

1.7. Duration of the contract

The resulting framework contract shall enter into force on the date of signature of the last contracting party, i.e. Cedefop, and shall be valid for a period of 1 year. It may be automatically renewed up to three (3) times, each time for an additional period of one (1) year, covering an acquisition period of total four (4) years (1+1+1+1).

1.8. Start date and period of execution

The scheduled date for entry into force of the framework contracts, as a guide, is: 01/12/2008.

The actual date on which performance of the tasks is to start will be stipulated for each study in accordance with Cedefop's needs but Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

1.9. Publication rights and intellectual property

Following the provisions of the service contract to be signed and Cedefop's citation policy, Cedefop's name will appear on the title page of publications. Acknowledgment to the external service providers/contractors, experts and other contractors will appear on a specific acknowledgement page. Articles published by Cedefop in readers will bear the name of their authors and be cited as such.

Any results or rights, including copyright and other intellectual or industrial property rights, obtained in performance of the Contract, shall be owned solely by Cedefop, which may use, publish, assign or transfer them as it sees fit, without geographical or other limitation. Please note that Cedefop shall not be required to distribute or publish documents or information supplied in performance of the Contract.

Documents based in whole or in part upon the work undertaken in the context of the contract may be published given prior written approval by Cedefop.

1.10. Main terms of financing and payment

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

2. TECHNICAL SPECIFICATIONS

2.1. Introduction

The issue of the economic and social benefits of vocational education and training (VET) is key to evidence-based policy making. Understanding the contribution of VET to individuals' career, employability and social inclusion as well as its impact on economic growth and productivity is important in the context of assessing investments in VET as compared to other types of education or learning. Demonstrating the positive returns to training may also inform and guide investment in training.

Despite its key policy relevance, also in the context of the Copenhagen process and Lisbon strategy, it is however an under-researched issue. Research on the specific returns to VET, either initial or continuing is ill-developed. Most available research investigates the benefits of education overall, eventually by education level. It does not distinguish by type of education (VET vs. general education) and usually focuses on initial education, thus not analysing the specific returns to continuing vocational education and training.

Calculation of the private and social rates of returns to education uses and compares educational level or years of schooling, so does growth analysis. Some recent research on growth has used skills level (literacy) instead of educational attainment. Using this approach the estimated impact of human capital on growth is higher, thus demonstrating that the quality of skills may matter more to growth than the numbers of years of schooling or the educational attainment. In research on the returns to enterprises, the distinction general/specific training has been introduced by Becker in the 1960s and refined in further research but it has proven difficult to be operationalised and is somehow outdated for the current debate on lifelong learning and skills development. Research on the specific returns to vocational education and training (VET), either initial (IVET) or continuing (CVT) is not very much developed.

2.2. Cedefop activities on the returns and benefits to VET

For its 5th Research Report, Cedefop will investigate the returns and benefits of VET. Cedefop will not only synthesise critically research available on the benefits of education and VET and review the concepts, theories and methods that can be applied to the field, but it also intends to finance new research to break new grounds on the economic and social benefits specifically of VET. This is the object of this call.

Cedefop will investigate the benefits of VET at micro (individual, enterprises), meso (sectors, social groups and communities) and macro (economy and society, country and European Union) levels. Social groups and communities refer to socio-professional categories (managers, office employees, technical or lower supervisory occupations, workmen, employers, self-employed and own account workers...) and to any other groups which as such may have a particular interest in VET, e.g. persons with disabilities, people with an immigrant background, Roma population, older workers, early school leavers, people with low levels of education and qualifications, the unemployed, marginalised population groups, those living in disadvantaged areas or outlying regions, people with learning difficulties, and organisations for the promotion of gender parity.

Benefits will include monetary returns as well as economic (e.g. employment, productivity, growth) and social benefits (e.g. health, social cohesion, trust). Within 'benefits', Cedefop includes direct benefits and indirect benefits such as externalities and spillovers. In analysing the benefits of VET Cedefop's ambition is also as far as possible to differentiate the effect of different programme orientation (vocational / general) and of different types of learning (initial / continuing) and to disentangle the determinants of positive returns.

The results and findings of Cedefop activities on the benefits of VET will be discussed, together with their policy implications, in Cedefop 5th report on vocational education and training research, to be published in 2011.

2.3. Dimensions of the economic and social benefits of VET

Benefits of VET can be analysed in absolute, relative and comparative terms. While absolute benefits are the benefits measured *per se*, introducing comparison leads to relative and comparative measures of benefits. In the comparative measure of benefits, two complementary ways can be distinguished. Firstly, VET contribution can be compared with the contribution of general education, for example. Secondly, VET can be split into types of VET (e.g. school-based, alternance, apprenticeship, etc.) which can be compared to one another. In this research, the benefits of VET shall be expressed in absolute, relative and comparative terms wherever possible. In doing so, particular attention will be devoted to the possible “ability bias” when comparing VET and general education.¹ Another issue is that distinguishing between general education and VET assumes that educational pathways are reliably classified in one of the two categories in countries and from one country to another. As several authors have shown (e.g. McCoshan et al. 2007²), this might not be the case and there may be inconsistency in the classifications available, which therefore would need prior analysis. In addition, mostly at higher levels, VET and general education become increasingly intertwined, evidenced by vocationalisation of general education and academisation of VET (Dunkel et al., 2008³; Cedefop, 2009⁴). The same may apply to the definition and classification of continuing vocational training and other forms of further learning. Finally, comparing VET types to one another would also need a prior typology of these pathways. In the absence of a reference typology, alternatives and proposals shall be discussed as part of the research.

When benefits are monetary (which is often not the case of social benefits), they can be net or gross. Calculation of net economic benefits takes into account the economic costs of investing in VET. At country level, costs are borne not only by State and other public bodies but also by other economic agents, especially individuals, households and firms. Economic costs of VET are of two types: direct and indirect. Direct costs involve the expenditure of public bodies (programmes and institutions for VET promotion at the EU level; country-level costs for building infrastructure, wages of educational staff, subsidies to training institutions, scholarships, notably) as well as private costs (e.g. trainee tuition fees and firms’ expenditures for apprentice wages or outsourced training). Indirect costs relate to such matters as tax expenditures and opportunity

¹ It might be the case that students enrolling in initial VET have generally lower school ability than those in general education. Such a possible ability gap, although mostly unobservable, should be kept in mind when measuring the comparative benefits of VET relative to general education.

² McCoshan, A. et al. *Beyond the Maastricht Communiqué: An Analysis of Selected VET Priority Areas*. Birmingham (UK): Ecotec, 2007.

³ Dunkel, T. et al. Through the Looking Glass – Diversification and Differentiation in Vocational Education and Training and Higher Education, In: Cedefop (ed.), *Modernising Vocational Education and Training. Fourth Report on vocational education and training research in Europe: Background Report – volume 2*. Luxembourg: EUR-OP. (Cedefop reference series), 2008.

⁴ Lasonen J., Gordon J., Image and Attractiveness of VET, In: Cedefop (ed.), *Modernising Vocational Education and Training. Fourth Report on vocational education and training research in Europe: Synthesis Report*. Luxembourg: EUR-OP. (Cedefop reference series), 2009, forthcoming. Available on Internet as working document: http://www.trainingvillage.gr/etv/Projects_Networks/ResearchLab/forthcoming.asp [cited 27.3.2008].

costs (investing in VET instead of in any more profitable use of resources). Ball (2005⁵) provides examples of all these types of costs. In this research, the economic benefits shall be analysed in net terms whenever possible.

The benefits of VET can be analysed in the short-, medium- or long-term perspectives. Short-term returns are recorded immediately or in the first or second year following the investment in VET. Medium-term returns need a span of two to four/five years before becoming observable. Long-term returns can be felt only five/six or more years after the investment in VET was made. It would not be surprising if many of the benefits of VET were of medium- or long- term nature. In this research, the benefits of VET shall be analysed in the short-, medium- and long-run wherever possible.

2.4. Geographical and thematic scope

The geographical scope for the project is the European Union Member States. However, as available comparable data may not allow investigating economic and social benefits of VET in all Member States and for the EU as a whole, specific studies may focus on countries for which good and relevant statistical data are available. All along the research and especially while choosing countries and analysing data sets, contractors should keep in mind that their findings and policy recommendations are expected to be not only of local/regional/national but also of European scope and interest.

Vocational education and training (VET): VET comprises all more or less organised or structured activities that aim to provide people with knowledge, skills and competences necessary to perform a job or a set of jobs, whether or not they lead to a formal qualification. VET is independent of venue, age or other characteristics of participants and previous level of qualifications. VET may be job-specific or directed at a broader range of occupations. It may also include elements of general education.

Initial vocational education and training (IVET): VET carried out in the initial education system, usually before entering working life. Initial vocational education and training can be carried out at any level as full-time school-based, in alternance training or in apprenticeship.

Continuing vocational (education and) training (CVET/CVT): VET after initial education and training or entry into working life, aimed at helping individuals to improve or update their knowledge and/or skills; acquire new skills for a career move or retraining, continue their personal or professional development. CVET/CVT is part of lifelong learning and can be formal or non-formal.

2.5. Description of the activities and studies tendered with this call - LOTS

Lot 1: Economic benefits of VET at macro level and for social groups and communities

The question addressed in this research is: what are the net economic benefits of investing in VET for society as a whole and for social groups and communities? The aim is to analyse the specific contribution of VET (both initial and continuing) in generating economic benefits for social groups and communities, for the society at country level and for the European Union, in the short-, medium- and long- terms.

⁵ Ball, K. Relative Contributions of Individuals, Industry and Government to the Costs of VET, *In*: Ball, K. (ed.), *Funding and financing vocational education and training*, Research Readings, Adelaide: NCVER, 2005, p. 73-85.

Lot 2: Social benefits of VET for the individual

This research should analyse the impacts of different programme orientation (general and vocational) and of learning at different ages and life stages on various social benefits which may accrue to individuals. The aim is to analyse the specific contribution of VET (both initial and continuing) in generating social benefits for the individual in the short-, medium- and long- terms.

Lot 3: Social benefits of VET for social groups, communities and society

This research should analyse the impacts of different programme orientation (general, vocational) and of learning at different ages and life stages on various macro-social benefits. The aim is to analyse the specific contribution of VET (both initial and continuing) in generating social benefits for social groups, communities and society in the short-, medium- and long- terms.

In carrying out these studies, account must be taken of the European Commission's work and analysis within its experts networks EENEE (European Expert Network on Economics of Education, <http://www.education-economics.org/>) and NESSE (Network of experts in social sciences of education, <http://www.nesse.fr/nesse>).

A detailed description of each lot is provided at the end of this section.

2.6. Deliverables and timetable

The framework contract will be concluded over a period of maximum 4 years (1+1+1+1).

The specific activities and studies covered by this framework contract must be implemented by the deadlines which will be laid down by Cedefop.

Studies and respective order forms will stipulate the tasks to be performed by the contractors, the timetable and the deliverables.

Each lot provides an indicative calendar of activities and deliverables for each framework contract. Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

2.7. Reports

Reports shall be submitted to Cedefop in English (see details in each lot). They should be submitted in Microsoft Word with all tables, graphs or images included at the appropriate place in the text. The report shall be supplemented by any graphs, tables and images in the appropriate software and by the statistical databases used during research (to allow for Cedefop's check).

Reports shall be drafted in compliance with the requirements of Cedefop style manual (see Annex H).

Reports should be edited by a researcher in the field being either an English native-speaker or having an equivalent proficiency level to ensure a good readability.

2.8. Travels

The contractor will be requested to attend scheduled meetings at Cedefop, as referred in each lot.

All costs incurred, including travel and accommodation related to these scheduled meetings as well as any travel expenses that may occur in performing the tasks as described in each lot have to be included in the financial offer (estimated costs/trip per person) (see point 5.4).

As an exception to this, the inception meetings for lots 2 and 3 will be reimbursed by Cedefop separately according to its relevant rules (see Annex IV of the draft contract in Annex B).

In the event that some additional meetings may be required or requested to perform the tasks related to the contract, they shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex IV of the draft contract in Annex B).

3. SPECIFIC INFORMATION CONCERNING THE LOTS

Lot 1

Economic benefits of VET at macro level and for social groups and communities

1. Research question

The question addressed in this research is: what are the net economic benefits of investing in VET for the society as a whole and for social groups and communities? The aim is to analyse the specific contribution of VET (both initial and continuing) in generating economic benefits for social groups and communities, for the society at country level and for the European Union, in the short-, medium- and long- terms.

2. Problem statement

Investigating the economic benefits of VET at macro and meso levels is necessary to VET policy making at the European Union and Member States levels. A sound understanding of the returns of investing in VET is a pre-requisite to better adjust VET policies and programmes and to coordinate and streamline VET and general education more efficiently.

Extensive research has been devoted so far to analysing the macro-economic returns to education in general (Wilson and Briscoe, 2004). However, as Descy and Tessaring (2005: 206-207) have noted, the specific contribution of VET to macro-economic performance has been under-researched. As regards the economic benefits of VET for social groups, a general introduction to this issue was proposed by Carnoy (1994), and some authors have investigated the specific situations of women (Campbell et al., 2005; Fitzenberger and Kunze, 2005; Lee and Lee, 2005; Sakellariou, 2006), immigrants (Andren and Andren, 2006; Colding, 2006), people with disabilities (Hennessey and Muller, 1995), and the unemployed (Hebbar, 2006; Stenberg, 2007). But research in this field has not been systematic and remained concentrated on a few number of social categories. The benefits for several social groups are therefore still unexplored.

These gaps in research and analysis need to be filled. Given the specific role and operating mode of the VET system within the educational system, there is no reason why the findings for education in general should not reflect precisely the specific situation and contribution of VET. Clarifying the specific contribution of VET at macro and meso levels would help understanding the specific strengths of VET and in which respects it best performs; in which situations VET is indispensable to the economy i.e. which functions VET performs better than general education and to which functions it should be specifically devoted; in what the social groups benefit from VET, and especially which types of VET are most useful to them; how to better identify the target groups of VET and better fit the VET system to their needs by involving them in its design and governance; how the different types of VET modes, patterns and pathways contribute to macroeconomic performance and as a consequence how to organise the VET system most efficiently; in what VET is indispensable to - and in synergy with - general education; how to most efficiently arrange the relationships and combination between VET and general education at national level; and how to most efficiently organise the respective places of VET and general education in education policies, especially as regards the funding, staffing and esteem of both strands.

Economic benefits can be defined as advantages in terms of wealth increase. At the level of social groups, the economic benefits of VET can be in the form of increased employability and earnings. At the level of society as a whole, economic benefits can be in the form of increased employment (and hence employment income and tax income) or avoided or reduced

unemployment (saved unemployment benefit payments), more investment, increased exports and trade surplus, foreign direct investment and balance of payments surplus, GDP growth, to mention a few. At the international level, in the particular perspective of the European Union and especially the Lisbon Strategy, such issues as innovation capacity, the use of technology, economic competitiveness and sustainable growth are also of interest when economic benefits are discussed. The objective of this research is to analyse the various possible types of economic benefits of investing in VET for social groups, countries and the EU.

3. Method

The objective of this research is to find out the various possible types of short-, medium- or long-term net economic benefits of investing in VET, whether absolute, relative or comparative, for the EU, for its country members, and for social groups and communities. The benefits analysed shall mainly be in terms of employment, earnings, investment, exports and trade surplus, foreign direct investment and balance of payments surplus, GDP growth rate, innovation performance, technology use, competitiveness, and economic growth sustainability. These shall be the dependent variables to be used in this research.

The method recommended to address this research problem is as follows.

- (1) Contractors shall review, analyse and synthesise relevant research literature on the economic returns to VET for social groups and at macro (including EU) level, including the theories able to explain these types of meso and macro economic impacts of VET, and the empirical methods used.
- (2) Drawing on this review of the literature, contractors shall build a new conceptual/theoretical framework or amend (an) existing one(s) for the purpose of this research, and shall present, explain and justify their approach.
- (3) Based on this theoretical framework, contractors shall develop, present and explain the empirical model they design for empirical verification, including the choice and explanation of variables, indicators and data.
- (4) Then contractors shall analyse data using preferably regression analysis and if not possible other methods, provided they are associated with statistical tests. Data analysis shall use the most suitable tools available and shall apply state-of-the-art methods and approaches.
- (5) Finally, contractors shall contribute to evidence-based policy making by linking empirical research findings to policy implications.

Tenderers shall propose the most appropriate indicators for the dependent and independent variables. They may also propose additional dependent variables and/or techniques for data analysis, but should justify such proposals in terms of the added value to the envisioned research. Alternative variables and/or methodological approaches may also be proposed, provided that the tenderers explain how these would, better than the above recommended, fit the objective and conduct of the research envisaged. Tenderers should also justify the choice of specific social groups as the object of analysis.

An important task of the research will be to identify appropriate data sets. If existing data sources prove insufficient, the tenderers should envisage the collection of necessary data. The research findings on the benefits of VET and the resulting policy recommendations are expected to be not only of local/regional/national but also of European scope and interest. It is therefore recommended that the research team builds upon a transnational network to access and to analyse data in various European countries and integrate a comparative dimension in the research.

To address this multifaceted research question, it is not only recommended that tenderers rely on an international grouping, network or consortium, but also that the research team is multidisciplinary, representing preferably the following disciplines and fields:

- Education and training research, preferably with expertise in VET
- Inferential statistics
- Economic analysis, especially education economics, labour economics, human resources management, macroeconomics, public economics, economic growth, industrial and business economics, technological change, international economics, sustainable development and economic sociology
- Sociology, especially sociology of social classes, social stratification and community research, sociology of education and sociology of work.

4. Tasks and planning

Work package	Task
1	Literature review Review, analysis and synthesis of relevant research literature on the economic returns to VET at macro (including EU) level and for social groups and communities, including the theories able to explain these types of macro and meso economic impacts of VET, and the empirical methods used.
2	Typologies Review the existing typologies of VET modes/patterns and select or design one.
3	Conceptual and theoretical framework Build a new conceptual/theoretical framework or amend (an) existing one(s) for the purpose of this research, and present, explain and justify the approach thus adopted.
4	Identification of data sources Identification of international/national/regional/local data sets that would allow for investigating empirically the research questions. Contractors shall select the most appropriate variables, indicators and data in order to reach findings and policy recommendations which shall be not only of local/regional/national but also of European scope and interest. Minimum geographical coverage recommended: whenever possible, the data used shall cover at least 5 European countries, each either nationally or at least locally (¹). Alternatively, if existing data sources prove insufficient, contractors shall organise the collection of necessary data.
5	Empirical model Develop, present and explain an empirical model for testing, including the choice and explanation of variables, indicators and data.
6	Data gathering Purchase and/or survey of relevant data.
7	Data analysis Statistical tests and/or regression analysis. Contractors shall use the most suitable tools available and shall apply state-of-the-art methods and approaches. Interpretation of results.
8	Drafting of a final report to Cedefop including: - An introduction to the research - The literature review - The theoretical framework - The empirical methods - The results and findings, their interpretation and critical analysis, their policy implications and indications for further research

	- Relevant annexes and bibliography.
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Notes:

(¹) In case national/local data sets are used, variables may be different across data sets (as it may be difficult to identify the same variable in all data sets) but they should remain relevant for the purpose of the study.

Indicative calendar of work

- Start of the work: February 2009
- Interim report: August 2009
- Final report: February 2010

Travels to Thessaloniki to meet with Cedefop projects managers should take place:

- At the start of the work
- At the end of the research (final results meeting).

In the context of each lot, there may be additional studies (order forms) during the course of the framework contract which cannot be specified at this stage. Such additional studies will be subject to separate complementary funding (see table in point 1.5 for an indication of the budget estimate for each lot). Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

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Lot 2

Investigating the social benefits of VET for the individual

1. Research question

This research should analyse the impacts of different programme orientation (general and vocational) and of learning at different ages and life stages on various social benefits which may accrue to individuals. The aim is to analyse the specific contribution of VET (both initial and continuing) in generating social benefits for the individual.

2. Problem statement

The benefits of education and VET extend beyond the economic outcomes. The education system is a primary agent of socialisation. VET contributes to the formation of occupational identities and develops a sense of belonging to a community of practice. Adult education and CVET contribute to the further development of personal and professional identities. Through facilitating and maintaining labour market integration, VET can be a major determinant of social inclusion but occupational socialisation is also one important way in which VET can jointly contribute towards inclusion and cohesion within societies. (OECD, 2007; Preston and Green, 2008; Descy and Tessaring, 2005)

Research on the social outcomes of learning has investigated both micro-social and macro-social benefits. Micro-social outcomes accrue to the individual as a result of participation in learning, though the relation may be indirect: e.g. better health (Feinstein et al., 2006), civic and social engagement (Campbell, 2006), social inclusion (Preston and Green, 2008), social capital (Schuller, 2001; OECD, 2007), well-being (OECD 2007). Macro-social benefits extend the focus of analysis to wider units, such as the family, community and nations. Such outcomes and externalities and spillovers cannot be attributed to particular agents but they may accrue, as a result of the provision of education, training and learning, to communities and social groups (e.g. political engagement, social mobility) as well as society (e.g. welfare benefits – reduction of health care costs, reduction of crime; institutional benefits – increased trust and social capital, support to democracy; social cohesion, environmental and sustainable development awareness, etc.). (Green et al., 2004; Descy and Tessaring, 2005)

SOCIAL BENEFITS OF LEARNING

For individuals	For social groups and communities	For society
Social inclusion, social capital, civic and social engagement, better health and parenting ...	Social status, political, social and cultural participation, social mobility ...	Welfare (health, criminality, reduction of poverty ...), tolerance, trust and social cohesion, awareness of environmental protection and sustainable development ...

Social benefits cannot be simply equated to non-material outcomes. They have monetary and economic implications. For individuals, social and labour market inclusion, better health and social capital means access to paid employment and avoidance of unemployment and non-participation in the labour market. For societies, the containment of health costs, of unemployment and the reduction of crime have major and direct positive budgetary consequences. It has also been demonstrated that social cohesion, social capital and social infrastructure and democracy are conducive to economic growth (Schuller, 2001; Descy and Tessaring, 2005; OECD, 2007; Preston and Green, 2008). Particularly in the field of health, attempts have been made to monetarise the benefits of education (see for example Groot and Maassen van den Brink, 2006).

For various reasons, one of them being data availability, the research literature that differentiates the social effects of education for individuals by programme orientation (general/vocational) or analyses the impact of learning at different ages and life stages is thin. One example of such research is the work of Bynner and Hammond (2004) who, using longitudinal data in the UK, analysed the differential effects of different types of adult learning. They found that employer-provided work-related training courses appear to lead to positive non-material benefits for adults who participated between the age of 33 and 42 in terms of civic and political participation, positive social and political attitudes and life satisfaction. Vocational accredited courses were also found to reduce chances of becoming depressed and to increase race tolerance.

Cedefop has, for its fourth research report, also attempted to look at the specific social benefits of VET on social inclusion (Preston and Green, 2008). In terms of social exclusion, VET has a large role in increasing labour-market participation (a narrow form of inclusion) but wider issues of social inclusion are also considered (such as citizenship). It is arguable whether models of VET premised on delivering competence and employment alone yields the types of social inclusion desired by EU Member States. In some countries however, e.g. Germany, for historical and institutional reasons, VET plays a role of vocational socialisation that extends beyond labour market inclusion and which may be considered a non-material benefit. The authors also conclude that it should certainly not be assumed that targeting VET to disadvantaged groups on the basis of predetermined characteristics (e.g. migrants, disabled, low qualified) is necessarily the optimum method of addressing social exclusion because of the heterogeneity of each group and of the existence of different types of social exclusion.

Some of the mechanisms through which education generates health benefits may be relevant for discussing how different programme orientation and types of learning may generate social benefits for the individual. One of the ways in which education generates health benefits is by influencing individuals' self-concepts such as self-efficacy and self-esteem as well as their valuation of the future (e.g. ability to assess the costs/benefits of preventive medicine) (Feinstein et al., 2006). Education may enable or empower individuals, allowing them to realise benefits but may also have negative effects and contribute to develop injurious self-concepts, learning and development (for example through school failure and negative learning experiences). Education also impacts on the contexts that people come to inhabit (e.g. safe job, better neighbourhood) and their opportunity to choose among contexts, which in turn may determine other social benefits. (OECD, 2007)

3. Purpose of the research

Research on the individual social benefits of learning has identified a number of potential benefits. It has come to grasp with some of the mechanisms through which positive or negative outcomes may be realised. However, due to the lack of appropriate empirical data, it has been difficult to establish causal relationships and to analyse the impacts of different programme orientation (general/vocational) and of learning at different ages and life stages. However, from a policy and individual investment point of view identifying which type of education is most likely to generate specific social benefits is key missing information.

Cedefop herewith intends to commission research to investigate:

- the *impact of different programme orientation* (general/vocational) in initial education and training in generating social benefits for the individual (social inclusion, social capital, civic and social engagement, better health,...); particular attention should be paid to the *specific social benefits of VET*, i.e. the kind of individual social benefits most likely to be generated by VET (e.g. vocational socialisation, formation of professional identities, social inclusion, well-being, life and job satisfaction,...) and to *mechanisms through which social benefits of various programme orientation*, including VET, may be generated (or not) and how this links to economic outcomes;

- the *impact of further and adult learning*, in particular of a *vocational/professional nature* (CVET) on generating social benefits (e.g. well-being, life and job satisfaction, positive social attitudes); particular attention should be paid to the *mechanisms* through which various types of further learning, including VET, may generate (or not) social benefits and how this links to economic outcomes.

The research should also consider the links between social and economic benefits at micro level.

4. Method

In dealing with these research issues the focus should be on combining theoretical analysis, empirical data analysis and conceptual mapping and modelling. In addition, qualitative biographical research could bring useful insight on the way specific social benefits are realised.

Method:

- (1) Based on a sound review of the literature, develop a conceptual and theoretical framework and suitable empirical models
- (2) Identify and use appropriate data sources, combine existing data sources or collect new data if necessary for empirical analysis
- (3) Analyse data using the most suitable analytical tools and by applying state-of-the art statistical methods and approaches, using whenever possible regression analysis
- (4) Carry out biographical qualitative studies to deepen the understanding of how VET contributes to social benefits and the process underlying the realisation of specific benefits
- (5) Contribute to evidence-based policy-making by drawing policy implications from research findings.

To shed light on short- , medium- as well as long- term benefits, analysing the individual social benefits should as far as possible rely on longitudinal data to capture the impact of alternative learning pathways, including learning that occurs after initial education and training.

The international data sets that could be used to analyse social benefits (e.g. Eurostat survey of income and living conditions, European and World Value Surveys) do not allow differentiating VET vs. other kinds of programme orientation and are not adequate to investigate the impact of continuing VET and adult learning. An important task of the research is therefore to identify appropriate national/local data sets. If existing data sources prove insufficient, the tenderer should envisage the collection of necessary data.

The research findings on the benefits of VET and the resulting policy recommendations are expected to be not only of local/regional/national but also of European scope and interest. It is therefore recommended that the research team builds upon a transnational network to access and to analyse data in various European countries and integrate comparative dimensions in the research. It is also recommended that the research team is multidisciplinary, representing preferably the following disciplines and fields:

- Education and training research, preferably with expertise in VET
- Inferential statistics
- Sociology and/or economics of education and/or labour.

Alternative variables and/or methodological approaches may also be proposed, provided that the tenderers explain how these would, better than the above recommended, fit the objective and conduct of the research envisaged.

5. Tasks and planning

Work package	Task
1	<p>Conceptual and theoretical framework</p> <p>Separately for initial and continuing VET, carry out a conceptual and theoretical analysis of the social benefits of VET for individuals based on the research literature.</p> <p><i>Outcome:</i> identification of the most relevant social benefits in relation to VET, contextualised by initial or continuing VET</p>
2	<p>Identification of data sources / Data gathering</p> <p>Identification of international/national/local data sets that would allow for investigating empirically the social benefits identified as a result of step 1 (min. geographical coverage 5 European countries, if possible) ⁽¹⁾.</p> <p>Alternatively, if existing data sources prove insufficient, develop survey methods and organise the collection of necessary data.</p> <p><i>Outcome:</i> Systematic analysis of the potential and analytical power of each international/national/local data set identified, including data validity and quality of VET variables (initial or continuing education and training, types of education - VET/general) and of social benefits variables</p>
3	<p>Empirical model</p> <p>Modelling of the various hypotheses that could be tested with the available data and analysis of the potential for comparative cross-country analysis for particular benefits.</p> <p><i>Outcome:</i> An interim report to Cedefop presenting a conceptual and theoretical framework based on literature review, the intended empirical approach including justification and a proposal for using one or more data sets</p>
4	<p>Data analysis</p> <p>Statistical analysis of the data.</p> <p>Interpretation of the results of the empirical testing and statistical analysis; conceptual analysis of the determinants and mechanisms through which benefits of various programme orientations and types of learning are realised; comparison of results across countries applying a comparative framework taking into account national institutional characteristics.</p> <p><i>Outcome:</i> The empirical findings and their interpretative analysis.</p>
5	<p>Qualitative study (optional work package) ⁽²⁾</p> <p>Complement the empirical analysis by a selection of biographical qualitative studies to deepen the understanding of how specific social benefits are realised, taking into account specific institutional and national contexts</p>

6	<p>Final report drafting</p> <p>Drafting of a final report to Cedefop including:</p> <ul style="list-style-type: none"> • a brief literature review of the social benefits of learning for the individual and an introduction to the research, • a presentation of the conceptual and theoretical analysis, the modelling of hypotheses and the findings, • a critical analysis of the results and findings, their policy implications and indications for further research, • relevant annexes (including an annex describing data sets and methods) and bibliography.
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(1) Note: in case national/local data sets are used variables may be different across data sets (as it may be difficult to identify the same variable in all data sets) but they should remain relevant for the purpose of the study.

(2) Work package 5 'Qualitative study' will be the subject of a separate study and respective order form, to be treated independently of the empirical analysis and to be decided following progress of the latter.

Indicative calendar of work

- Starting date for the work: December 2008
- Interim report: April 2009
- Final report: December 2009

Travels to Thessaloniki to meet with Cedefop project managers should take place:

- at the start of the work (inception meeting; exceptionally this meeting should not be included in the financial proposal. It will be reimbursed separately)
- at the end of the research (final results meeting).

In the context of each lot, there may be additional studies (order forms) during the course of the framework contract which cannot be specified at this stage. Such additional studies will be subject to separate complementary funding (see table in point 1.5 for an indication of the budget estimate for each lot). Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

6. References

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Lot 3

Investigating the social benefits of VET for social groups, communities and society

1. Research question

This research should analyse the impacts of different programme orientation (general, vocational) and of learning at different ages and life stages on various macro-social benefits.

The aim is to analyse the specific contribution of VET (both initial and continuing) in generating social benefits for social groups, communities and society.

2. Problem statement

The benefits of education and VET extend beyond economic outcomes. The education system is a primary agent of socialisation. VET contributes to the formation of professional identities and develops a sense of belonging to a community of practice. Adult education and CVT contribute to the further development of personal and professional identities. Through facilitating and maintaining labour market integration, VET can be a major determinant of social inclusion but vocational socialisation is also one important way in which VET can jointly contribute towards inclusion and cohesion within societies. (OECD, 2007; Preston and Green, 2008; Descy and Tessaring, 2005)

Research on the social outcomes of learning has investigated both micro-social and macro-social benefits. Micro-social outcomes accrue to the individual as a result of his/her participation in learning, though the relation may be indirect: e.g. better health (Feinstein et al., 2006), civic and social engagement (Campbell, 2006), social inclusion (Preston and Green, 2008), social capital (Schuller, 2001; OECD, 2007), well-being (OECD 2007). Macro-social benefits extend the focus of analysis to wider units, such as the family, communities and nations. Such outcomes and externalities and spillovers cannot be attributed to particular agents but they may accrue, as a result of the provision of education, training and learning, to communities and social groups (e.g. political engagement, social mobility) as well as society (e.g. welfare benefits – reduction of health care costs, reduction of crime; institutional benefits – increased trust and social capital, support to democracy; social cohesion, environmental and sustainable development awareness, etc.). (Green et al., 2004; Descy and Tessaring, 2005)

SOCIAL BENEFITS OF LEARNING

For individuals	For social groups and communities	For society
Social inclusion, social capital, civic and social engagement, better health and parenting ...	Social status, political, social and cultural participation, social mobility ...	Welfare (health, criminality, reduction of poverty ...), tolerance, trust and social cohesion, awareness of environmental protection and sustainable development ...

Social benefits cannot be simply equated to non-material outcomes. They have monetary and economic implications. For individuals, social and labour market inclusion, better health and social capital means access to paid employment and avoidance or reduction of unemployment and non-participation in the labour market. For societies, the containment of health costs, of unemployment and the reduction of crime have major and direct positive budgetary consequences. It has also been demonstrated that social cohesion, social capital, social infrastructure and democracy are conducive to economic growth (Schuller 2001, Descy and Tessaring, 2005, OECD, 2007, Preston and Green, 2008). Particularly in the field of health,

attempts have been made to monetarise the benefits of education (see for example Groot and Maassen van den Brink, 2006).

For various reasons, one of them being data availability, the research literature that differentiates the macro-social effects of education by programme orientation (general/vocational) or analyses the impact of learning at different ages and life stages is thin. Examples of such research are the studies commissioned by Cedefop for its fourth research report to Preston and Green (2008) and Tsakarissianos (2008).

Preston and Green conclude that within European countries educational equality is associated with maintaining civil and political rights and trust (see also Green et al. 2003, Green et al. 2004). On the basis of current evidence, however, the authors could not conclude whether there is a strong association between vocational enrolments and equity in the distribution of educational outcomes. Thus they could not identify the specific contribution of VET. In relation to social mobility and social fluidity, Tsakarissianos concludes that selective systems that favour rigid selection and educational orientation at an early age (into VET and general education) contribute considerably to social reproduction effects. Research and empirical data drawn out of particular cases have shown however that comprehensive reforms do not significantly affect the relative class inequalities, although they increased access to all types of schools for pupils of different class origins. They rather shifts the ground of competition to securing educational qualifications rather than reducing inequalities in relative educational opportunities. Current reforms of VET policies aim to achieve higher status and attractiveness of VET vis-à-vis general education, to widely introduce and validate integrated curricula that enable flexibility and favour mobility between VET and general education, to facilitate access to higher education and/or other post-secondary education institutes and to ensure recognition of VET credentials in the labour market. Tsakarissianos concludes that future research should focus on the impact of such policies implemented in their specific national context, e.g. further research on the comprehensive reforms in their various implementations should highlight social mobility and equality aspects besides learning achievements and career success.

With respect to the mechanism according to which education leads to social benefits, Campbell (2006) identifies three models that investigate in which ways education may impact on civic and social engagement (CSE) and which may be of relevance when investigating the specific role of VET in generating (or not) macro-social benefits:

- The ‘absolute model’: it is an individual’s own educational attainment level which determines specific social outcomes (e.g. likelihood of voting). Thus, an overall increase in education leads to an overall increase of these particular social outcomes. In this context, if VET contributes to the overall increase of educational attainment, it contributes to generating the specific social benefits concerned. However, it could be that some types of education are more likely to be conducive to specific social outcomes than others. This would require further investigation.
- The ‘relative or positional model’: it is an individual’s level or type of education relative to others which explains an observed relationship between education and a social outcome (e.g. participation in politics). In this model, education is a signal and serves the structural needs of social systems (OECD, 2007). Following this model increasing levels of education, preserving the overall inequality in educational outcomes, will not increase social benefits.
- The ‘cumulative model’: realising social benefits is conditional upon the average level of education of the individual’s peers but also to the equality in attainment across groups (e.g. interpersonal trust). Such social outcomes are therefore sensitive to educational inequality as Green et al. (2003, 2004) have also observed. In this context, it is the potential role of VET in generating educational (in)equality that is of interest.

3. Purpose of the research

Research on the macro-social benefits of learning has so far focused on education as a whole and in some cases has used skills or educational attainment levels as a variable, but it has not differentiated the impact of various programme orientations (general/vocational) and has rarely addressed the potential impact of further learning and continuing training (as for example Preston and Feinstein, 2004). Attempts to articulate macro-social effects and educational equality (educational distribution effect) have not sufficiently addressed the role played by various programme orientations in different countries in generating educational equality or inequality. Finally in terms of social benefits and the way they are realised by different social groups or communities, further research should address the role of programme orientation and pathways in maintaining social reproduction and of the potential of educational reforms in promoting social fluidity. How adult learning and continuing VET may generate positive social outcomes for some social groups or communities by generating attitude change is also an issue that has a high interest for both research and policy.

Cedefop herewith intends to commission research to investigate such issues. In the scope of macro-social benefits Cedefop encompasses those social benefits which may accrue to social groups and communities and to societies. Cedefop particular interest lies in:

- the *impact of different programme orientation* (general/vocational) in initial education and training in generating macro-social benefits; specific attention should be paid to the *mechanisms* through which various programme orientation, and in particular VET, may generate macro-social benefits for social groups, communities and society
- the *impact of further and adult learning*, in particular *of a vocational/professional nature* (CVET) on macro-social benefits for social groups, communities and society.

Within the range of macro-social benefits, specific attention should be paid to the macro-social benefits identified as goals for the European Union (so called 'Lisbon goals'), such as social cohesion.

The research should also consider the links between social and economic benefits at meso and macro levels.

4. Method

In dealing with these research issues the focus should be on combining theoretical analysis, empirical data analysis and conceptual mapping and modelling. Cross-national comparative methods bring useful insights when studying macro-social benefits at the level of societies. In this context, comparing European countries should be privileged.

Method:

- (1) Based on a sound review of the literature, develop a conceptual and theoretical framework and select or develop suitable empirical models
- (2) Identify and use appropriate data sources, combine and link existing data sources or collect new data if necessary for empirical analysis
- (3) Analyse data using the most suitable analytical tools and by applying state-of-the-art statistical methods and approaches, using whenever possible regression analysis
- (4) Contribute to evidence-based policy-making by drawing policy implications from research findings.

International data sets that can be used to analyse macro-social benefits (e.g. European and World Value Surveys) do not allow differentiating VET vs. other kinds of programme orientation and are not adequate to investigate the impact of continuing VET and adult learning. Exploring the

possibilities for combining various international/national/local sources may thus be necessary. An important task of the research will therefore be to identify appropriate national/local data sets, also for analysing those benefits which may accrue to social groups and communities. If existing data sources prove insufficient, the tenderer should envisage the collection of necessary data.

The research findings on the benefits of VET and the resulting policy recommendations are expected to be not only of local/regional/national but also of European scope and interest. It is therefore recommended that the research team builds upon a transnational network to access and to analyse data in various European countries and integrate comparative dimensions in the research. It is also recommended that the research team is multidisciplinary, representing preferably the following disciplines and fields:

- Education and training research, preferably with expertise in VET
- Inferential statistics
- Sociology and/or economics of education and/or labour.

Alternative variables and/or methodological approaches may also be proposed, provided that the tenderers explain how these would, better than the above recommended, fit the objective and conduct of the research envisaged.

5. Tasks and planning

The research will be divided into two studies, to be carried out consecutively and subject to different order forms:

- 1) Macro-social benefits of VET for society
- 2) Social benefits of VET for social groups and communities

For each study, the same work packages and tasks are foreseen:

Work package	Task
1	<p>Conceptual and theoretical framework</p> <p>Based on the available literature, carry out a conceptual and theoretical analysis of the macro-social benefits of education that integrate the possible impact of various programme orientations (general/vocational) and of further learning/continuing VET.</p> <p><i>Outcome:</i> identification of the most relevant research questions and hypothesis and the most relevant macro-social benefits to study</p>
2	<p>Identification of data sources / Data gathering</p> <p>Identification of international and national/local data sets that would allow for investigating empirically the research questions and hypothesis identified as a result of step 1 (min. geographical coverage 5 European countries, if possible) (¹).</p> <p>Alternatively, if existing data sources prove insufficient, organise the collection of necessary data.</p> <p><i>Outcome:</i> Systematic analysis of the potential and analytical power of each data set identified, including data validity and quality of education variables (initial or continuing education and training, types of education - vocational/general) and of macro-social benefits variables</p>
3	<p>Empirical model</p> <p>Modelling of the various hypotheses that could be tested with the available data and analysis of the potential for comparative cross-country analysis for particular benefits.</p> <p><i>Outcome:</i> An interim report to Cedefop presenting a conceptual and theoretical framework based on literature review, the intended empirical approach including justification and a</p>

	proposal for using one or more data sets
4	<p>Data analysis Statistical analysis of the data. Interpretation of the results of the empirical testing and statistical analysis; conceptual analysis of the determinants and mechanisms through which benefits of various programme orientations and types of learning are realised; comparison of results across countries applying a comparative framework taking into account national institutional characteristics. <i>Outcome:</i> Empirical findings and their interpretative analysis</p>
5	<p>Drafting of a final report to Cedefop including:</p> <ul style="list-style-type: none"> • a brief literature review of the macro-social benefits of learning for the social groups, communities and for society and an introduction to the research, • a presentation of the conceptual and theoretical analysis, the modelling of hypothesis and the findings, • a critical analysis of the results and findings, their policy implications and indications for further research, • relevant annexes (including an annex describing data sets and methods) and bibliography.
<p>(¹) In case national/local data sets are used, variables may be different across data sets (as it may be difficult to identify the same variable in all data sets) but they should remain relevant for the purpose of the study.</p>	

Indicative calendar of work

Macro-social benefits of VET for society	Social benefits of VET for social groups and communities
Start of the work: December 2008	Start of the work: January 2010
Interim report: May 2009	Interim report: May 2010
Final report: December 2009	Final report: January 2011

For both studies, travels to Thessaloniki to meet with Cedefop project managers should take place:

- at the start of the work (inception meeting; exceptionally the meeting to take place in 2008 should not be included in the financial proposal. It will be reimbursed separately)
- at the end of the research (final results meeting).

In the context of each lot, there may be additional studies (order forms) during the course of the framework contract which cannot be specified at this stage. Such additional studies will be subject to separate complementary funding (see table in point 1.5 for an indication of the budget estimate for each lot). Cedefop will, as a guide, provide an annual schedule of anticipated consultancy requirements.

6. References

Campbell D. E., 2006. What is education's impact on civic and social engagement? In: Desjardins R., Schuller T. (eds.) *Measuring the effects of education on health and civic/social engagement*. Paris: OECD.

Descy, P.; Tessaring, M., *The Value of Learning – Evaluation and Impact of Education and Training*. Third Report on Vocational Training Research in Europe: Synthesis Report. Luxembourg: EUR-OP. (Cedefop reference series 61), 2005.

Feinstein L. et al., 2006, What are the effects of education on health?. In: Desjardins R., Schuller T. (eds.) *Measuring the effects of education on health and civic/social engagement*. Paris: OECD.

Preston, J.; Green, A., The role of vocational education and training in enhancing social inclusion and cohesion, In: Cedefop (ed.) *Modernising vocational education and training. Fourth report on vocational training research in Europe: background report*. Luxembourg: Publication Office, forthcoming (Cedefop reference series). Available on Internet as working document: http://www.trainingvillage.gr/etv/Projects_Networks/ResearchLab/forthcoming.asp [cited 11.3.2008].

Green, A.; Preston, J.; Sabates, R. *Education, equity and social cohesion: a distributional model*. Research Report 7. Centre for Research on the Wider Benefits of Learning. London: Institute of Education/Birkbeck, 2003.

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Schuller T., 2001. The complementary roles of human and social capital, In: Helliwell J.F. (ed.) *The Contribution of human and social capital to sustained economic growth and well-being, International symposium report*. Human Resources Development Canada and OECD, pp 89-106.

Tsakarissianos, G. Social mobility, In: Cedefop (ed.) *Modernising vocational education and training. Fourth report on vocational training research in Europe: background report*. Luxembourg: Publications Office, forthcoming (Cedefop reference series). Available on Internet as working document: http://www.trainingvillage.gr/etv/Projects_Networks/ResearchLab/forthcoming.asp [cited 11.3.2008].

4. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

4.1. Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a definitive court judgement;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a definitive court judgement for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Means of proof required

The tenderer shall provide the self-declaration found in Annex C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

In case of recommendation for contract the tenderer may be requested to provide the following documentation before signature of the contract:

Cedefop will accept, as satisfactory evidence that the tenderer is not in one of the situations described in point a), b) or e) above, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.

Cedefop will accept, as satisfactory evidence that the tenderer is not in the situation described in point d) above a recent certificate issued by the competent authority of the State concerned.

Where no such certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

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

4.2. Selection criteria

The tenderer must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

Economic & Financial capacity

Requirement

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

Proof of economic and financial capacity may in particular be furnished by one or more of the following documents:

- appropriate statements from the banks or evidence of professional risk indemnity insurance;
- balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

In case tenderers are unable to provide such documents they are required to provide justification for non provision.

Technical and professional capacity

The service provider must comply with the following criteria:

- Proven experience in the field of research described in the lot concerned and capacity to apply this experience to the analysis of the benefits of VET
- Ability to set up a cross-national network of research institutes/researchers in the relevant field in Europe, to bring together expertise for exploring the specific research question described in the lot and to ensure a transnational research design
- Proven experience in selecting, handling and analysing appropriate local, national and international data sets and, in case data collections are to be carried out, proven experience in collecting data in the relevant field.

The following documents or information must be presented as evidence of compliance with the above criteria:

- Description of the professional capacity of the tenderer, especially with regards to the field of research described in the lot concerned, attested also by the detailed CVs of those responsible for providing the services
- A list of relevant studies carried out by the tenderer over the past 10 years in the field of research described in the lot, attested also by a list of scientific publications

- A list of research institutes/researchers which will be mobilised during the course of the framework contracts for carrying out specific activities or studies and corresponding letters of intent (*tenderers should pay attention to the provisions made for sub-contracting and consortia, see 5.1. and 5.2.*)
- A description of the tenderer's study and research capacity and facilities,
- A description of the means to be employed to ensure the quality of the services.

4.3. Legal Position

Tenderers are requested to complete the Legal entity form found in Annex D and to provide the documents requested in the form. Tenderers must ensure to include the name and function of the individual(s) entitled to sign on behalf of the organisation in the case of contract award.

5. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER

5.1. Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such grouping (or consortia) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a tender.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria (only for the part of the work that they would undertake). Concerning the selection criteria 'technical and professional capacity', the evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

Tenders from consortia of firms or group of service providers, contractors or suppliers, must specify the role, qualifications and experience of each member or group.

If awarded, the contract will be signed by the company or the person heading the project who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

5.2. Subcontracting/Subcontractors

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the tenderers' tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. The subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition. If awarded, the contract will be signed by the tenderer, who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

The tenderer must indicate clearly, which parts of the work will be sub-contracted, and identity of all subcontractors undertaking more than 10% of the work by value.

All subcontractors must provide the required evidence for the exclusion and selection criteria, also with regard to 'technical and professional capacity' (only for the part of the work that they would undertake).

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

6. AWARD OF THE CONTRACTS

Only the tenders meeting the requirements of the exclusion and selection criteria (see 4.1. and 4.2.) will be evaluated in terms of quality and price.

A score will be calculated for each tender. For each lot, tenders will be ranked following the overall score they obtain for quality and price. A framework contract shall be awarded to the tenderer submitting the tender that obtains the highest score.

The formula to calculate the score of a tender both in technical (quality) and financial terms shall be:

$$Score = \text{Quality points} + \left[10 * \left(\frac{\text{Lowest Total Staff Price}}{\text{Total Staff Price}} \right) + 10 * \left(\frac{\text{Lowest Total Other Costs}}{\text{Total Other Costs}} \right) \right]$$

where

- Quality points are the points awarded to the technical proposal through the technical evaluation by application of Award Criteria 1 to 3 (see 6.1. and 6.2.);
- ‘Total Staff Price’ is the total cost of all workdays for all studies already foreseen by Cedefop in the lot, i.e. the sum of the total number of workdays x Daily price for each of the three staff categories (senior / junior researchers and secretary, see 6.3. and 6.4.);
- Total Other Costs of a proposal include all costs except staff prices (see 6.3. and 6.4.).

Rating quality

Quality will be rated by applying Award Criteria 1 to 3 (max. 80 pts). (See 6.1. and 6.2.)

Tenders obtaining less than 35 pts in award criterion 2 or less than 10 points in award criterion 3 will be eliminated.

Rating Prices and Costs

As regards the financial proposal (see 6.3. and 6.4.), both staff prices and other costs will be taken into consideration.

(a) Staff prices

The basis for assessment will be the ‘Total Staff Price’ (TSP) calculated as the sum of the total number of workdays x Daily price for all three staff categories.

Each proposal gets a number of points equal to:

$$TSP \text{ points} = 10 * \left(\frac{\text{Lowest Total Staff Price}}{\text{Total Staff Price}} \right)$$

- The lowest ‘Total Staff Price’ thus gets 10 points.

(b) Other costs

The basis for assessment is the Total of other costs (TOC).

Each proposal gets a number of points equal to

$$TOC \text{ points} = 10 * \left(\frac{\text{Lowest Total Other Costs}}{\text{Total Other Costs}} \right)$$

- The lowest TOC thus gets 10 points.

(c) Rating of the financial proposal

The proposal with the lowest staff prices and costs will be given advantage by getting the maximum points (10 points each). The number of points attributed to any other financial proposal will be determined by the ratio 'Lowest TSP or TOC divided by this proposal's TSP or TOC'. The bigger the gap between the lowest proposal and another offer, the fewer the points gained by this other offer.

6.1. Technical evaluation

The following technical award criteria (quality) will be applied to this tendering procedure to select framework contractors:

- Award criterion 1 – Sound understanding of the purpose of the activities and studies to be carried out in the context of the framework contract (10 points);
- Award criterion 2 – Relevance and soundness of the methods proposed (50 points);
- Award criterion 3 – Work organisation and appropriateness of the expertise proposed and allocation of human resources/experts in relation to the type of studies to be carried out, including external expertise in case of consortium or sub-contracting (20 points);

Tenders obtaining less than 35 pts in award criterion 2 or less than 10 points in award criterion 3 will be eliminated.

6.2. Technical proposal

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 technical specifications. To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

- a concise discussion of the subject demonstrating in-depth understanding of the concepts, methodologies and research issues; this discussion should contain an analysis of the difficulties likely to be encountered (methodological and others) in investigating the research questions specified in the lot and an indication of how the tenderer intends to address these difficulties
- A description of the methods to be followed for investigating the research question(s) described in the lot including the collection mode (data base purchase, own survey, sub-contracted survey, else...), description and preliminary analysis of local, national and international data sources that could be used during the course of the study(ies)
- A description of work organisation for the study(ies) already specified by Cedefop in the lot, i.e. the team to be assigned to the project, the expertise of its members, the tasks distribution among them and the number of work days per staff category (junior/senior) per work package, including external expertise in case of consortium or sub-contracting.

In addition to the above the tenderer must provide the information concerning consortium and subcontracting as requested in points 5.1 and 5.2.

6.3. Financial evaluation

The financial evaluation will be made on the basis of the **daily fees x total number of working days** and **total other costs** for the study(ies) currently foreseen by Cedefop in each lot.

There may be additional studies to those described in each lot during the course of the framework contract, which cannot yet be specified by Cedefop when drafting this call for tender. Such additional studies will be subject to separate order forms and complementary funding.

The price applied for any additional study will be a function of **daily fees** (as indicated in the tenderer's financial proposal) according to the level of seniority of the experts and for secretarial and assistant support **and other costs** (travels, equipment, data costs, etc.).

6.4. Financial proposal

The financial proposal should indicate daily fees according to level of seniority of the proposed experts, and other fees (administrative and assistant support, etc.) and costs to carry out the activities indicated in the lot. The tenderers must present a detailed breakdown of the price offered.

For each lot, the financial proposal of the tenderers must be provided in the table presented in the attached Annex F.

Information concerning price

- The prices quoted must be fixed and not revisable (for the first year of the contract).
- Prices must be quoted in euro and include all expenses.
- Travel expenses (see point 2.8) must be included unless otherwise specified.
- 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 may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

7. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should note in particular the instructions indicated in points 2 and 3 this open invitation to tender.

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

7.1. Envelope A - Supporting documents

One original and one copy of:

- the checklist found in Annex G
- the exclusion criteria declaration as requested in point 4.1 and standard template found in Annex C
- the selection criteria documents as requested in point 4.2
- the legal entity form found as requested in point 4.3 and found in Annex D
- a statement containing the name and position of the individual(s) entitled to sign the contract
- the financial identification form as found in Annex E

7.2. Envelope B – Technical proposal

One original signed unbound copy and four bound copies of:

- the technical proposal providing all information requested in point 6.2 including information relevant to subcontracting as requested in point 5.2.

7.3. Envelope C – Financial proposal

One original signed unbound copy and four bound copies of:

- the financial proposal containing all information requested in point 6.4

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT FRAMEWORK CONTRACT

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

I hereby declare that neither I nor the company:
(*Company Name*).....

that I am representing are in any of the situations mentioned below:

- a) is bankrupt or being wound up, is having his/her affairs administered by the courts; has entered into an arrangement with creditors; has suspended business activities; is the subject of proceedings concerning those matters; or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) has been convicted of an offence concerning his/her professional conduct by a definitive court judgement;
- c) has been guilty of grave professional misconduct proven by any means which Cedefop can justify;
- d) has not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which he/she is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) has been the subject of a definitive court judgment for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, he/she has been declared to be in serious breach of contract for failure to comply with his/her contractual obligations.

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

- is subject to a conflict of interest;
- is guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Signature:

Date:

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal entity of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/ftiers_en.htm

ANNEX F

FINANCIAL OFFER FORM

LOT Nr:

	Daily price	Number of workdays for all studies* defined by Cedefop in the lot**
Senior researcher		Total number of senior researcher working days =
Junior researcher		Total number of junior researcher working days =
Secretary and other services		Total number of secretary and other services working days =
		Total other costs (TOC) for all studies defined by Cedefop in the lot***
		TOC =

* Lot 1= study 1; Lot 2= Study 1 + additional work package; Lot 3= Studies 1 and 2

** The estimated total number of working days must be justified by the methodology and work organisation

*** Any other cost included must be duly justified and in line with the methodology proposed

A detailed justification of travel costs (estimate of costs/trip per person) and costs for buying and/or collecting data as well any other costs directly related to carrying out the tasks described in this call for tender **must** accompany the financial offer. In the absence of such detailed justification, the tender will be eliminated.

ANNEX G

CHECK LIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please Tick ✓ the boxes provided

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u> one original and one copy of: - this checklist		<input type="checkbox"/>	<input type="checkbox"/>	
- exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	4.1, 5.1 & 5.2	<input type="checkbox"/>	<input type="checkbox"/>	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	4.2, 5.1 & 5.2	<input type="checkbox"/>	<input type="checkbox"/>	
- legal entity form	4.3	<input type="checkbox"/>	<input type="checkbox"/>	
- name and position of the individual(s) entitled to sign contract	4.3	<input type="checkbox"/>	<input type="checkbox"/>	
- financial identification form	7.1	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'B' must contain</u> one original and four copies of:				
- the technical proposal	6.2	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Envelope 'C' must contain</u> one original and four copies of:				
- the financial proposal	6.4	<input type="checkbox"/>	<input type="checkbox"/>	

You should also ensure that:

<input type="checkbox"/>	your offer is formulated in one of the official languages of the European Union.
<input type="checkbox"/>	both the technical and financial proposals of the offer are signed by you or your duly authorised agent.
<input type="checkbox"/>	your offer is perfectly legible in order to rule out any ambiguity.
<input type="checkbox"/>	your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
<input type="checkbox"/>	the outer envelope bears the information mentioned in the invitation to tender point 3.