



European Centre for the
Development of Vocational Training
Procurement Service

Thessaloniki, 27/02/2006
PRO-2006-040

OPEN INVITATION TO TENDER
CEDEFOP No AO/A/EWS-PLI-PDE/VETpolicy-making/002/06

Trend scouting to underpin VET policy making

TENDER CONDITIONS

Dear Sir/Madam,

1. With reference to the Open invitation to tender “*Trend scouting to underpin VET policy making*”, published in the Supplement to the Official Journal of the European Union No 2006/S 39-041359 on 25.02.2006, please find enclosed the necessary documents.

The purpose of this invitation to tender is to conclude study contract(s) in accordance with the attached Tendering Specifications.

If you are downloading these documents from our website, kindly send us an e-mail (C4T-services@cedefop.eu.int) notifying us.

2. If you are interested in this invitation to tender, you should submit a tender *in triplicate* in one of the official languages of the European Union (preferably in English).
3. You may choose to submit the tender:
 - a) either by post or by courier not later than **10.04.2006** in which case the evidence shall be constituted by the date of despatch, the postmark or the date of the deposit slip, to the following address:

European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
For the attention of Mr C. Lettmayr
PO Box 22 427
GR – 55102 Thessaloniki
Greece

(b)delivered by hand not later than 17:00 on **10.04.2006** to the following address:

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

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's holidays.

4. Tenders must be placed inside two sealed envelopes. The inner envelope, addressed to the service indicated above, should be marked as follows:

OPEN INVITATION TO TENDER
CEDEFOP No: AO/A/EWS-PLI-PDE/VETpolicy-making/002/06
Trend scouting to underpin VET policy making
LOT no

Tender from (name of Tenderer):

NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

5. All the documents that must be produced in order to tender are listed in the attached Tendering Specifications. The draft study contract is annexed to the Tendering Specifications.
6. Tender(s) must be:
 - Signed by the Tenderer or his duly authorised representative;
 - Perfectly legible so that there can be no doubt as to words and figures.
7. 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 study 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.
8. The opening of tenders will take place at Cedefop on *19.04.2006 at 15:00*. 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.eu.int) no later than 17:00 on *18.04.2006*.
9. Period of validity of tenders, during which Tenderers may not modify the terms of their tenders in any aspect: 6 months from 10.04.2006.

10. 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 nature of the contract. 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.eu.int).

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 sent simultaneously to all Tenderers who have requested the specifications (candidates invited to tender).

- 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.

11. 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.

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.

You will be informed whether or not your tender has been accepted.

Yours sincerely,

(Signed)

Christian Lettmayr
Deputy Director

Attached: tendering specifications

OPEN INVITATION TO TENDER

NO. AO/A/EWS-PLI-PDE/VETpolicy-making/002/06

Trend scouting to underpin VET policy making

Tendering specifications

Table of contents

ABOUT CEDEFOP – general introduction	6
1 OBJECT OF THE CONTRACT.....	6
1.1 Description of the contract	6
• Description of the object and purpose of the contract.....	6
• Site or location of works, place of delivery or performance.....	6
• Division into lots.....	6
• Variants.....	7
• Total quantity or scope.....	7
1.2 Duration of the contract.....	7
2 LEGAL, ECONOMIC, FINANCIAL AND TECHNICAL INFORMATION	7
2.1 Condition relating to the contract.....	7
• Main term of financing and payment.....	7
• Legal form to be taken by the grouping of suppliers.....	7
• Subcontracting.....	8
2.2 Condition for participation.....	8
2.2.1 Conflict of interest.....	8
2.2.2 Legal position – means of proof required.....	8
2.2.3 Exclusion of Tenderers.....	8
• Grounds for exclusion.....	8
• Means of proof required.....	9
2.2.4 Selection Criteria.....	9
• Economic and financial capacity – means of proof required.....	10
• Technical capacity – means of proof required.....	10
• Evaluation of Tenderers.....	10
2.3 Other documents to be provided.....	10
• Individual(s) entitled to sign the contract.....	10
• Financial Identification Form.....	10
2 AWARD OF THE CONTRACT.....	11
3.1 Awarding procedure/method.....	11
3.2 Award criteria.....	11
3.2.1 Quality evaluation of the tender.....	11
• Quality criteria.....	11
• Evidence to be provided.....	11
3.2.2 Financial evaluation of the tender.....	11
• Evidence to be provided.....	11
• Information concerning price.....	11
3 TECHNICAL SPECIFICATIONS.....	12
A Introduction: General context and purpose of the tender.....	13
B Technical Specifications and objectives of individual lots.....	19

ANNEXES:

Annex I: Contract Notice

Annex II: Draft contract

Annex III: Legal entity form

Annex IV: Financial Identification Form

Annex V: Price and estimated budget breakdown

ABOUT CEDEFOP – General introduction

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.

1. OBJECT OF THE CONTRACT

1.1 Description of the contract(s)

- **Description of the object and purpose of the contract(s)?**

The purpose of this tender is to contract out studies to examine vocational education and training (VET) policies in the EU and in its competitor countries, to investigate selected areas that affect VET and to provide relevant research findings so as to support evidence based policy making.

- **Site or location of works, place of delivery or performance**

Contractors' premises.

- **Division into lots**

This invitation to tender comprises five lots:

Lot 1: Vocational education and training policies in the EU competitor countries

Lot 2: Demographic perspectives and implications for VET

Lot 3: Tapping the potential within – In what way can VET policies foster the social and labour market integration of immigrants and their descendants?

Lot 4: Low skilled people in the European and global labour market

Lot 5: Improving the attractiveness and the image of VET

Tenderers may submit proposals for more than one lot. Please note that if you tender for more than one lot, a separate technical and financial proposal must be made for each lot. Individual lots will be assessed and awarded separately.

The various Contractors resulting from this call for tender may be requested to exchange data, participate in common meetings or workshops, etc. where appropriate (see chapter 4, section B, technical specifications of the individual lots).

- **Variants**

Variants will not be accepted apart from the additional or alternative proposals specifically referred to in the technical specifications for the individual lots. They are subject to acceptance from Cedefop (please see chapter 4, section B, for more details)

- **Total quantity or scope**

Maximum price:

Lot 1: 25 000 EUR

Lot 2: 24 000 EUR

Lot 3: 38 000 EUR

Lot 4: 17 500 EUR

Lot 5: 30 000 EUR

1.2 Duration of the contract

The contract(s) shall enter into force on the date of signature and shall be valid for a period of 7 months for lots 1 - 4 and 10 months for lot 5.

2. LEGAL, ECONOMIC, FINANCIAL AND TECHNICAL INFORMATION

2.1 Conditions relating to the contract

- **Main term of financing and payment**

Payments will be made 30 days after submission of invoices and at the conditions set out in the draft contract and in the technical specifications for each lot.

- **Legal form to be taken by the grouping of suppliers**

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

- **Subcontracting**

Sub-contracting is permitted, provided that the value of the services to be sub-contracted does not exceed 50 % of the value of the contract. All subcontracting must be approved by the Contracting Authority, either by accepting the Contractor's offer, or, if proposed by the Contractor after contract signature, by an addendum to the contract. Such an addendum will only be agreed, exceptionally, where such sub-contracting is judged by the Contracting Authority to be necessary to complete the project, and does not lead to distortion of competition. If awarded, the contract will be signed by the Tenderer who will be the only contracting party responsible for the performance of the contract.

The Tenderer must indicate clearly in their methodology, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 10% of the work by value. Full details of such subcontractors must also be given, in accordance with point 2.2 below.

2.2 Condition for participation

2.2.1 Conflict of interest

The Contractor shall take all necessary measures to prevent any situation that could compromise the impartial and objective performance of the Contract. Such conflict of interests could arise in particular as a result of economic interest, political or national affinity, family or emotional ties, or any other relevant connection or shared interest. Any conflict of interests which could arise during performance of the Contract must be notified to Cedefop in writing without delay. In the event of such conflict, the Contractor shall immediately take all necessary steps to resolve it.

2.2.2 Legal position – means of proof required

Tenderers must indicate in which State they have their headquarters or domicile and to present the supporting evidence normally acceptable of that country law. In addition, they should provide evidence of their inscription in the professional/trade register, if applicable. Tenderers are therefore requested to complete the Legal entity form in annex III and provide the requested documents.

2.2.3 Exclusion of Tenderers

- **Grounds for exclusion**

To be eligible for participating in this contract award procedure, Tenderers must certify that they are not in one of the situations listed below:

- a) they are 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) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;

- c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) they 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) they have been the subject of a judgement which has the force of *res judicata* 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.

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**

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 situation described in point c) and f).

2.2.4 Selection criteria

Tenderers are required to prove that they have sufficient economic, financial, technical and professional capacity to perform the contract.

- **Economic and financial capacity – means of proof required**

Proof of economic and financial capacity may in particular be furnished by 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 or overall turnover and turnover concerning the services covered by the contract during the last three financial years.

In case tenderers are unable to furnish such documents they are required to provide justification.

- **Technical and professional capacity – means of proof required**

For details/criteria see chapter 4, section B, technical specifications of each individual lot.

- **Evaluation of tenders**

Only the tenders meeting the requirements of the selection stage will have their offers evaluated.

2.3 Other documents to be provided

- **Individual(s) entitled to sign the contract**

Tenderers should submit a statement containing the name and position of the individual(s) entitled to sign the contract

- **Financial identification form**

The financial identification form in annex IV must be sent, duly completed and signed, with the tender.

3. AWARD OF THE CONTRACT

3.1 Awarding procedure/method

The bids which meet the selection criteria will be assessed in terms of quality and price.

The contract(s) shall be awarded to the Tenderer(s) submitting the bid which offers the best-value-for-money (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the score for quality by the price, thus indicating which tender represents the best value for money.

Tenders scoring less than 60 (of a maximum of 100) points on quality, will not be considered technically acceptable.

3.2 Award criteria

3.2.1 Quality evaluation of the tender

- **Quality criteria**

See detailed description in chapter 4, section B, technical specifications for each individual lot

- **Evidence to be provided**

See detailed description in chapter 4, section B, technical specifications for each individual lot

3.2.2 Financial evaluation of the tender

- **Evidence to be provided**

See detailed description in chapter 4, section B, technical specifications for each individual lot.

- **Information concerning price**

- The price quoted must be fixed and not revisable
- Prices must be quoted in Euro and include all expenses
- Under article 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.
- All costs incurred in preparing and submitting tenders are borne by the Tenderers and cannot be reimbursed.

4. TECHNICAL SPECIFICATIONS

The purpose of this tender is to contract out studies to examine vocational education and training (VET) policies in the EU and in its competitor countries, to investigate selected areas that affect VET and to provide relevant research findings so as to support evidence based policy making.

This invitation to tender is divided in 5 lots:

Lot 1: Vocational education and training policies in the EU competitor countries

Purpose of the study: to examine and compare VET policy developments in selected EU competitor countries.

Lot 2: Demographic perspectives and implications for VET

Purpose of the study: to provide projections of demographic developments and illustrate their implications for IVET.

Lot 3: Tapping the potential within – In what way can VET policies foster the social and labour market integration of immigrants and their descendants?

Purpose of the study: to provide a better understanding of how VET policies and accompanying packages can contribute to encouraging immigrants to take up/continue learning.

Lot 4: Low skilled people in the European and global labour market

Purpose of the study: to discuss the concept and characteristics of 'low skilled' in EU countries and to refine the definition of 'low skilled people' in different countries and in the EU.

Lot 5: Improving the attractiveness and the image of VET

Purpose of the study: to examine policy strategies for improving the attractiveness and image of VET.

A INTRODUCTION: GENERAL CONTEXT AND PURPOSE OF THE TENDER

1 General context

1.1 Vocational education and training (VET) and its role within the Lisbon strategy (partnership for growth and jobs)

In 2000 the Lisbon European Council set the goal for the EU to become **‘the most competitive and dynamic knowledge-based economy in the world’**. Education and training is key to achieve this goal. Hence, the European Council called for education and training systems in Europe to become **‘a world reference for quality by 2010’** (Barcelona, 2002). They agreed on a common work programme - Education and Training 2010. The relevant follow-up documents are available on the Education & Training 2010 website: http://europa.eu.int/comm/education/policies/2010/et_2010_en.html

VET’s crucial role in the Lisbon strategy is underlined in the Copenhagen Declaration. The initiative known as Copenhagen process has helped VET actors in Europe to compare their policies, identify common priorities and agree on common principles, frameworks and measures to improve transparency and recognition of competences and qualifications, information and guidance services and the quality of VET, and thus support the mobility of trainees and workers.

In the overall context of the Copenhagen process, VET is understood as initial and continuing vocational education and training within the framework of lifelong learning. It encompasses educational, labour market and social policy measures.

The Maastricht Communiqué, ensuing from the first of the agreed biennial reviews in December 2004, underlined the need to modernise VET

- a) to increase its attractiveness and thus to boost participation rates and
- b) to offer all Europeans, whether young people, older workers, low skilled, unemployed or disadvantaged, the qualifications and competences they need to successfully participate in the labour market and in society.

(http://europa.eu.int/comm/education/news/ip/docs/maastricht_com_en.pdf)

It defined areas for investment and reform and – for the first time – also identified priorities for action at national level. These priorities were agreed by 32 countries, the European social partners and the Commission. The choice was based on the conclusions of a comprehensive study, the Maastricht Study, which assessed the contribution of VET to achieving the Lisbon goal (Leney et. al., 2004), and a synthesis provided by Cedefop (Tessaring and Wannan, 2004). To monitor follow-up and implementation, a review of these priorities will be held under the Finnish presidency in December 2006 during a ministerial meeting.

1.2. Cedefop’s contribution to the Lisbon strategy

The Maastricht Communiqué underlines Cedefop’s specific role in supporting the Copenhagen process, reporting on progress and exchanging good examples of policy and practice. The VET issues which require special attention and targeted action as defined in the Maastricht Communiqué, will guide Cedefop’s medium term priorities and annual work programme and, thus, its contribution to:

- improving the image and attractiveness of vocational routes to increase participation rates;
- achieving high levels of quality and innovation in VET provision to benefit all learners and make European VET globally competitive;
- linking VET with labour market requirements to meet the needs for highly skilled workers and, especially, ensure upgrading and competence development of older workers;
- providing suitable education and training opportunities for low skilled and disadvantaged people to achieve social cohesion and increase labour market participation.

In 2006, Cedefop will support the European Commission in gathering background material for the second review of the common priorities in VET during the ministerial meeting in December. Cedefop will also contribute to better exploitation of available statistics, data and indicators for VET.

Two areas of activities have been geared towards providing scientific support for the ministerial meeting: policy reporting and research reporting.

Policy reporting entails increasing knowledge and fostering mutual learning on the current VET policies and practices in the Member States. By examining vocational training policy at European level periodically, it monitors progress of and contributes to the implementation of the VET policy objectives on which the EU Member States have agreed to cooperate.

Research reporting entails providing a comprehensive review of current research in initial and continuing VET in Europe, its findings and their implications for policy, practice and future research. It also considers theoretical and methodological foundations and relates to economic, sociological, pedagogical, and other fields of social research. By reflecting both the main and emerging issues in VET research, research reporting may contribute to identifying new policy issues and defining the future policy agenda, beyond 2010.

As part of Cedefop's 'Maastricht follow-up activities' policy and research reporting will be closely linked to ensure these activities are coherent and complementary.

2. General purpose of this tender

The purpose of this tender is to contract out studies to examine vocational education and training (VET) policies in the EU and in its competitor countries, to investigate selected areas that affect VET and to provide relevant research findings so as to support evidence based policy making.

To this end, the tender is divided into five lots.

1. Vocational education and training policies in the EU competitor countries
2. Demographic perspectives and implications for VET
3. Tapping the potential within – In what way can VET policies foster the social and labour market integration of immigrants and their descendants?
4. Low skilled people in the European and global labour market
5. Improving the attractiveness and the image of VET

Lots 1 – 3 relate to policy reporting, lots 4 and 5 to research reporting.

2.1. Contribution to policy reporting

The studies in lots 1 – 3 are to provide new knowledge on cross-cutting policy issues and identify emerging ones and will contribute to the progress analysis and reference material which will inform Education Ministers and policy makers (see 1.2 and 1.3).

Cedefop will include the findings of these studies when drawing up a synthesis report on the progress EU-Member States, associated countries and candidate countries have made in implementing the Maastricht priorities. This synthesis report will also be based on the outcomes of a comprehensive analysis contracted out by the European Commission (An analysis of progress in relation to selected national vocational education and training priority areas, following the Maastricht Communiqué).

2.2 Contribution to research reporting

The studies tendered in lots 4 and 5 will gather research findings and reflect on their implications for policy practice and future research. The results of these studies will form part of Cedefop's fourth research report to be published in 2007/08, complementing those already commissioned in 2005. The findings will also feed into the review of the Maastricht priorities.

As in the previous editions, the fourth research report will be composed of two main publications:

- a **background report** with selected contributions of renowned researchers in different fields of VET-research (see lots 4 and 5), edited by Cedefop project managers and published in hard copy in 2007. The contributions will also be made available electronically on www.trainingvillage.gr.
- a **synthesis report**, drafted by Cedefop project managers, which will present the main VET research issues. It will be based on the contributions to the background report as well as on Cedefop's own research. It will be published in 2008 and draw conclusions for policy, research and practice.

Contributions to the research report should ensure proper coverage of research undertaken across Europe and across various disciplines of research to give a representative and comprehensive overview of VET research and development in European countries in the designated field. They are NOT country reports (with the exception of case studies) but should present information on VET research and development in several EU countries and – where relevant – also in non-EU countries. Comparative research should be favoured whenever possible.

Overarching theme and background contributions to the fourth research report

Cedefop's fourth research report will address the Copenhagen Declaration (2002) and in particular the 2004 Maastricht Communiqué. It will therefore pay particular attention to the policy implications of research findings.

'Modernising VET' is the overarching theme of Cedefop's fourth research report. In 2005, a number of background studies were launched to contribute to this fourth research report (Lots 4 and 5 aim at completing this list of topics).

- System innovation and evolution in European vocational education and training: 20 cases compared over time and state
- Geographical mobility
- Social mobility and vocational education and training
- The role of education and training in enhancing social cohesion
- Skill shortages
- Recognition of non-formal and informal learning as a tool to modernise the vocational education and training system
- Qualification frameworks as a tool to modernise the vocational education and training system
- Qualification frameworks: what tools for what systems' modernisation
- The private benefits from vocational training: a new framework
- Older workers and lifelong learning
- VET and higher education
- The workplace as a learning environment
- Impact of lifelong information, advice and guidance
- VET teachers and trainers
- Innovation in teaching and learning
- The impact of European strategies and priorities
- Sectoral approaches in lifelong learning
- New emerging issues beyond 2010

Contributions to the fourth research report should take on board findings of the previous research reports as well as those of the Maastricht study (Leney et al, 2004) and the Cedefop Synthesis report (Tessaring and Wannan, 2004). They should undertake to deepen issues, provide new interpretations and treat unresolved questions.

Detailed information on the previous research reports is available in Cedefop's European training village (http://www.trainingvillage.gr/etv/Projects_Networks/ResearchLab/).

3 Bibliographical references

The **Lisbon strategy** follow-up documents are available from Internet:

http://europa.eu.int/growthandjobs/index_en.htm [Last visit: 01.02.06]

The **'Education and Training 2010'** follow-up documents are available from Internet:

http://europa.eu.int/comm/education/policies/2010/et_2010_en.html [Last visit: 01.02.06]

Documents related to **employment** policies:

Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States (2005/600/EC). Available from Internet:

http://europa.eu.int/eur-ex/lex/LexUriServ/site/en/oj/2005/l_205/l_20520050806en00210027.pdf

[Last visit: 01.02.06]

Joint Employment Report 2004/2005 Council of the European Union, Brussels, 9 March 2005, 7010/05, SOC 102, ECOFIN 77. Available from Internet:

<http://register.consilium.eu.int/pdf/en/05/st07/st07010.en05.pdf> [Last visit: 01.02.06]

Council Decision of 22 July 2003 on guidelines for the employment policies of the Member States (2003/578/EC). Available from Internet:

http://europa.eu.int/eur-lex/pri/en/oj/dat/2003/l_197/l_19720030805en00130021.pdf [Last visit:

01.02.06]

3.1. Documents most relevant to VET and therefore this tender:

Declaration of the European Ministers of Vocational Education and Training, and the European Commission, convened in Copenhagen on 29 and 30 November 2002, on enhanced European cooperation in vocational education and training ('The Copenhagen Declaration'). November 2002. Available from Internet:

http://europa.eu.int/comm/education/copenhagen/copenhagen_declaration_en.pdf [Last visit:

01.02.06]

The Maastricht Communiqué on the future priorities of enhanced cooperation in vocational education and training (VET). 14 December 2004. Available from Internet:

http://europa.eu.int/comm/education/news/ip/docs/maastricht_com_en.pdf [Last visit: 01.02.06]

Leney et al. *Achieving the Lisbon goal: The contribution of VET*, 2004. Available from Internet:

<http://www.refernet.org.uk/35.htm#Achieving> [Last visit: 01.02.06]

Tessaring, M; Wannan, J. *Vocational education and training – key to the future. Cedefop synthesis of the Maastricht Study*. Luxembourg: EUR-OP, 2004 (Cedefop reference series). Available from Internet:

http://www.trainingvillage.gr/etv/HomePages/Front_page_news/Maastricht.htm

http://europa.eu.int/comm/education/policies/2010/studies/cedefop_en.pdf [Last visit: 01.02.06]

3.2. Document related specifically to lot 2 of this tender:

Communication from the Commission Green Paper "Faced with demographic change, a new solidarity between the generations" COM/2005/4 final. Available from Internet:

http://europa.eu.int/comm/employment_social/news/2005/mar/comm2005-94_en.pdf [Last visit:

01.02.06]

3.3. Documents related specifically to lot 3 of this tender:

Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions, First annual report on migration and integration/*COM/2004/508 final. Available from Internet:

http://europa.eu.int/comm/employment_social/employment_analysis/docs/com_508_en.pdf [Last visit: 01.02.06]

Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions on immigration, integration and employment/* COM/2003/0336 final. Available from Internet:

http://europa.eu.int/servlet/portail/RenderServlet?search=DocNumber&lg=en&nb_docs=25&do_main=Preparatory&in_force=NO&type_doc=COMfinal&an_doc=2003&nu_doc=336 [Last visit: 01.02.06]

3.4. Documents related specifically to lots 4 and 5 of this tender:

Descy, P.; Tessaring, M. (eds). *Evaluation of systems and programmes. Third report on vocational training research in Europe: background report*. Luxembourg: EUR-OP, 2004 (Cedefop Reference series, 57).

Descy, P.; Tessaring, M. (eds). *Impact of education and training. Third report on vocational training research in Europe: background report*. Luxembourg: EUR-OP, 2004 (Cedefop Reference series, 54).

Descy, P.; Tessaring, M. (eds). *The foundations of evaluation and impact research. Third report on vocational training research in Europe: background report*. Luxembourg: EUR-OP, 2004 (Cedefop Reference series, 58).

Descy, P.; Tessaring, M. (eds). *Training in Europe. Second report on vocational training in Europe 2000: background report*. Luxembourg: EUR-OP, 2001 (Cedefop Reference series, 3008).

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, 2005 (Cedefop Reference series).

Descy, P.; Tessaring, M. *Training and learning for competence. Second report on vocational education and training research in Europe: synthesis report*. Luxembourg: EUR-OP, 2001 (Cedefop Reference series, 6).

Tessaring, M. (ed.). *Vocational education and training – the European research field*. Background report. Luxembourg: EUR-OP, 1998 (Cedefop Reference Document).

Tessaring, M. *Training for a changing society: a report on current vocational education and training research in Europe*. Second edition. Luxembourg: EUR-OP, 1999 (Cedefop Reference Series).

B. TECHNICAL SPECIFICATIONS AND OBJECTIVES OF INDIVIDUAL LOTS

1. LOT 1: VOCATIONAL EDUCATION AND TRAINING POLICIES IN EU COMPETITOR COUNTRIES

1.1 Context and objectives

The background and purpose outlined in section 1 provide the context for this study. The aim to make the EU ‘the most competitive and dynamic knowledge-based economy in the world’ and its education and training systems ‘a world reference for quality by 2010’ make it necessary to look over the fence, and to look into the contribution of VET to economic performance and social cohesion in competitor countries.

In this respect, Cedefop is looking for a study to examine and compare VET policy developments in selected EU competitor countries (Australia, Canada, China, Japan, Korea, USA; India, Russia optional)

The findings of the study will serve Cedefop as a basis for:

- 1) identifying differences/similarities in VET systems between EU and competitor countries
- 2) identifying common challenges, aspirations and comparing solutions
- 3) drawing useful lessons to support EU Member States in VET policy development

1.2 Specific objectives and tasks of the Contractor

The study will:

- 1) present concise information on VET systems with a focus on strengths and weaknesses
- 2) analyse the main VET policies with a focus on strategic developments
- 3) examine in detail developments in selected VET areas (see 1.2.1 below)

The first part should be covered briefly and serve as background information helping to explain the nature and direction of *policy developments*. These should be given particular attention in the two following sections of the study. While information provided in the second part should focus on the *main strategies/policies in areas of key importance for the given country (-ies)*, the third part is to present examples of *specific measures/initiatives* which address the *issues* (also) *of EU concern*, reflected in Maastricht priorities. Given the wide scope of the Maastricht priorities, examination of which is not feasible for the purpose of this study, three areas have been chosen, namely:

- attractiveness of VET
- VET teachers and trainers
- guidance throughout life

Rather than analysing each of the countries separately, the study should adopt a *comparative approach* and identify *common trends* of both, pressures on the systems and the direction of reforms.

1.2.1 Tasks of the Contractor

Provide concise background information

This section should focus on the most characteristic features of countries' VET systems and serve as a background for further analysis.

- present countries' definitions of VET (*initial* and *continuing*) – its role and status, the kind of activities it includes (formal and non-formal) and the forms it can take; specify criteria which can help differentiate these areas, e.g. age, labour market status, type and level of providers and institutions involved, type of qualifications/certification that the courses/programmes lead to
- outline the milestones in VET development relevant to understand the current situation
- briefly explain the institutional framework (e.g. bodies responsible for governing VET at central/regional/local level); indicate the extent of cooperation among respective actors and between different levels
- briefly explain how IVET and CVT are organised, e.g. in terms of providers (public or private), target groups, access, types and levels of programmes, pathways and qualifications
- discuss the *strengths and weaknesses* in the current provision of VET as countries perceive them

Describe policy developments (focus of the study)

- present the main objectives of national VET policy
- identify major factors (e.g. economic, social, labour market, international agreements) which are currently shaping national VET policy
- determine the degree of synergy and interaction between VET and related policies (e.g. employment, social inclusion)
- list priority areas for VET, key issues at stake, e.g. qualification frameworks, attractiveness, financing, etc.
- present main policies/measures put in place/planned to address those issues
- identify the stakeholders responsible for implementing VET policies
- specify progress made, trends and main obstacles encountered

Analyse developments in selected VET areas

Image and attractiveness

- present trends in participation rates in IVET and CVT
- explain the status of VET vis-à-vis general education

- discuss why VET routes are (un)attractive to individuals and employers; explain if/how VET is linked to higher education
- present approaches/measures taken/planned to improve image and attractiveness of vocational routes (e.g. by ensuring progression into higher education)
- specify progress made and main obstacles encountered

VET teachers and trainers

- outline briefly types of VET teachers and trainers, their qualifications, workplace, working conditions, supply (shortages?)
- present the main objectives of national policies for teachers and trainers, identify the key issues and challenges
- describe the main measures put in place/planned to address those issues and any other initiatives related to:
 - raising the attractiveness of the profession and recruitment of new staff
 - improving the quality of teaching, supporting teachers/trainers in responding to evolving demands (e.g. new roles and responsibilities, use of new technologies, different learning environments, pedagogical challenges)
 - ensuring *continuing* development of teachers' and trainers' competences
- describe the role of teachers/trainers in the development of VET
- specify progress made and main obstacles encountered

Guidance

- explain countries' concepts of guidance (e.g. educational guidance, career guidance or holistic approach)
- outline the current provision of guidance services; indicate the most specific features of the systems
- present the main objectives of national policies for guidance services and identify the most important issues in the organisation, management and delivery
- paying particular attention to VET, describe the main measures in place/planned to address those issues and any other important recent initiatives, related to, e.g.:
 - broadening access to guidance services for all people at all stages of their lives
 - improving quality assurance mechanisms for guidance services at national/regional/local levels
 - ensuring development of people's lifelong learning and management skills as an integral part of education and training programmes

- strengthening structures for policy and systems development at national and regional level by involving the relevant actors
- ensuring career development and workforce development
- specify progress made and main obstacles encountered

Summarise the research findings, draw conclusions and recommendations

Indications on tasks execution and methodology:

Review of the literature

The study will present a review of the most relevant literature in the field.

Use of data sources

The research will build on the most recent data, using statistics and surveys at national level and international level. Data on the most important issues (e.g. participation rates in VET, financing of VET, VET teachers and trainers), including time series of the past five to ten years, where available, should be provided as an Annex.

Geographical framework

The study will cover the following countries: Australia, Canada, China, Japan, Korea and USA (India and Russia optional).

Tenders can also cover a cluster of countries. However, the maximum budget available for this study (see point 1.3.4) must be considered.

Analysis approach

The study should not be designed as individual country reports/overviews. The information on each of the themes should relate to all countries concerned and a comparative approach should be favoured whenever possible. Nevertheless, while giving the priority to issues comparable across countries, Contractors can also include country-specific information where appropriate/of particular interest. Tenderers may also propose additional issues according to their expertise and/or recent research developments.

1.3 Deliverables, timetables, costs

1.3.1 Reports: structure, length, requirements

The Contractor is required to submit:

- **an interim report** of approximately 10-20 pages which will include:
 - the structure of the final report
 - results of data survey on countries
 - intermediate findings and indicative conclusions
 - information on problems encountered, solutions found or proposed and impact on future work

- **a draft final report** and a **final report** of approximately 50 - 60 pages (without annex) which will include:
 - an executive summary
 - rationale and description of analysis approach
 - presentation of the findings
 - conclusions and recommendations

annex:

- bibliography and list of statistical sources used
- full set of data used and other additional relevant information

Cedefop will provide **comments** on both, the interim and the draft final report. The Contractor will take account of these comments in close communication with Cedefop project manager. Payment of the balance is conditional upon acceptance of a revised final report by Cedefop.

The Contractor will submit the reports in **English**, in **hard copy and in electronic format** (Word/ Excel). The electronic files must correspond fully to the hard copies. The tables, figures, graphs created in Word/ Excel (as appropriate) should also be made available as separate files and include the data used in order to reproduce the figures.

The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual which will form part of the contract.

1.3.2 Timetable of interim and (draft) final reports:

The Contractor is required to submit

- **the interim report:** **within 3 months** of the date on which the contract is signed
- **the draft final report:** **6 months** after the date the contract is signed
- **the final report:** **7 months** after the date the contact is signed.

To **support Cedefop in collecting background analysis for the review of the Maastricht priorities during the Education Ministers' meeting in December 2006** (see section A), the Contractor will provide **early findings in summer 2006**. Depending on the date of signature of the contract, these early findings may be integrated in the interim report.

1.3.3 Meetings

The Contractor will be invited to participate in two meetings which will take place in Thessaloniki:

- (1) upon delivery of interim report when the results will be discussed
- (2) 6 months after the date the contract is signed, presumably in October 2006

Travel expenses for meetings will be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract).

Other travel expenses that may occur in liaison with carrying out the tasks related to the contract have to be included in the financial offer.

1.3.4 Maximum budget

Maximum budget foreseen: 25 000 EUR

1.4 Selection criteria

1.4.1 Technical and professional capacity

The Tenderer must comply with the following criteria:

- qualifications, knowledge and ability of the Contractor and the key experts to perform the tasks outlined in 1.2.1
- professional experience in the areas covered by this study
- experience in comparative studies at international level
- capacity to access data and expertise world-wide
- linguistic ability

1.4.2 Evidence of the technical and professional capacity

The Tenderer must provide the following documents as evidence of the technical and professional capacity in compliance with 1.4.1:

- detailed CVs of the Contractor/s and key expert(s) with a brief description of research output/ list of publications related to the theme of this lot, including evidence of experience in comparative studies at international level
- list of major contracts/studies performed in the past three years with dates and recipients
- description of the measures employed to ensure the quality of services, and a description of the Contractor's study and research facilities (including technical equipment and tools to be used for performing the contract)
- evidence of capacity to access data and expertise world wide
- an indication of the proportion of the contract which the service provider may intend to subcontract

1.5 Award criteria

1.5.1 Quality evaluation

The quality of the tender will be assessed on the basis of the following award criteria and weighting:

Quality criteria

- a) Level of understanding of the nature of the proposed study, its context and results to be achieved **(30 points)**
- a.1) conceptual approach in line with the overall purpose of the tender and the objective of lot 1 (15 points)
 - a.2) adequacy of the proposed issues and the scope and form of the study; rationale for proposed additional issues (see 1.2.1) (15 points)
- b) Quality and appropriateness of the approach suggested to carry out the analysis, i.e. relevance and appropriateness of the way in which the analysis will be undertaken (e.g. envisaged steps, data sources to be used) to meet the requirements outlined in the technical specifications (see 1.2.1); **(40 points)**
- c) Organisation and management of the study **(30 points)**
- c.1) organisational approach and working methods (10 points)
 - c.2) type and degree of involvement of the proposed expert(s) (10 points)
 - c.3) capacity to perform the tasks within the deadline given (10 points)

Evidence to be provided for lot 1

The Tenderer for lot 1 must present the following documents:

- a description of the conceptual approach for undertaking the study, issues to be addressed and potential suggestions for additional issues (see 1.2.1), and nature of the results to be achieved..
- a detailed description of the envisaged approach for the required analysis, including a list of potential data-sources
- a detailed work plan illustrating intended organisation and management of the study; it will include:
 - indicative time-table with description of the deliverables (please refer to point 1.3.2)
 - a list of team members (if applicable) together with an explanation of the nature and extent of their participation in the study

1.5.2 Financial evaluation

The financial offer will be assessed on the basis of the total price of the tender. The Tenderer/s must provide a breakdown of the prices filling in the form in Annex V.

2. LOT 2: DEMOGRAPHIC PERSPECTIVES AND IMPLICATIONS FOR VET

2.1 Context and objectives

The prevailing demographic trend, expected to bring profound changes in the structure of the EU population over the next decades, has recently received considerable attention.

The European Commission Green Paper of March 2005¹ suggesting ‘regular (e.g. annual) analysis of demographic change and its impact on societies and policies’ is one of the examples of increasing concern at EU level.

Implications for education and training seem particularly far reaching. There is widespread belief that VET, both initial and continuing, has a key role to play in alleviating the potential negative effects that demographic change can have on EU economies.

Improving participation and productivity of the labour force by developing measures which encourage ‘active ageing’ is at the heart of public policy debate. Consequently, continuing training for older workers starts to attract due attention of policy makers and researchers.

Relatively little consideration, however, is given to the impact of demography on *initial* vocational education and training (IVET), although it will have to cope with both, the quantitative (number of VET students) and qualitative (VET structure and content) effects of demographic change. In the medium- and long-term, demographic change has dramatic implications for the future supply of skilled workers.

This study aims to fill an identified research gap, namely to provide projections of demographic developments and illustrate their implications for IVET. With this study, CEDEFOP aims to provoke the debate on and encourage in-depth analysis of various aspects of demographic change allowing to identify both challenges as well as opportunities it raises for VET area.

2.2 Specific objectives and tasks of the Contractor

The study will seek to explore the following issues:

How will demographic developments affect the future number of VET participants and leavers? What shifts in the occupational, sectoral and qualification structure of IVET can be expected taking into account the changes in skills demand caused by the demographic developments? To what extent may migration (suggested as partial solution to demographic downward trends) compensate for the decreasing number of IVET students/ graduates? What impact will the number of future IVET participants have on VET infrastructure and programmes which were developed in a very different demographic perspective? To what extent is a contraction (e.g. closing VET institutions or fewer teachers/trainers required where enrolment declines) or expansion (i.e. accommodating increase in enrolments) of the VET system capacity likely to take place? What are the implications for VET teachers and trainers? How will the decreasing number of future young cohorts with VET qualifications affect the labour force and how can the future labour market shape IVET?

The study will also draw policy-relevant conclusions and recommendations to support authorities responsible for the provision of VET in formulating rational long-term policy and adjusting IVET system to new demographic reality.

¹ Communication from the Commission Green Paper Confronting demographic change: a new solidarity between the generations – COM(2005) 94

2.2.1 Tasks of the Contractor

- ***Describe the present situation*** in the field at European and national level
 - Present current demographic trends (particular attention should be paid to the younger cohorts).
 - Specify current participation rates in vocational streams at all educational levels (including tertiary, where statistics are available) and present the characteristics of the VET students (e.g. gender, age, ethnic composition, sectoral and occupational structure, type of provider); if not available at EU level, at least in some representative Member States.
 - Provide comparative analysis and explain the differences between the countries

- ***Illustrate future developments and examine implications for VET***
 - Provide short-, medium and (optional) long-term forecast on future participation rates/ numbers of students and graduates in IVET taking into account current demographic trends and patterns of participation in IVET. Other assumptions which are likely to affect the forecast (e.g. education policy, economic condition, labour market, education preferences) should be made, where applicable.
 - Provide at EU level alternative scenarios for IVET using different assumptions about fertility, mortality and migration, as available in Eurostat's population scenarios.

*Under each of the provided scenarios, while carefully considering **migration factors***

- Compare the projected rates/ numbers/ patterns with current ones and identify the potential change in demand for future IVET delivery
 - Identify and examine the challenges that IVET is likely to face, e.g. changes in organisation of institutions, teacher recruitment, content
 - Discuss the potential opportunities provided by demographic change (e.g. deepening instead of widening investment in human capital)
 - Examine how the projected numbers of IVET graduates will affect the future labour force (e.g. in terms of the number of younger working-age people with VET qualifications)
 - Present innovative 'best practices' drawn from countries which have experienced demographic change, e.g. skilling of migrants, improving quality and target groups of IVET, etc. (optional)
- ***Draw conclusions and recommendations***
 - Summarise the findings and draw conclusions

- Suggest what kind of policy reforms or measures are needed to adjust to demographic change. The policy implications should also refer to EU objectives, Lisbon-Copenhagen-Maastricht process particularly, and provide a view of priorities beyond 2010.
- Indicate issues for further research

Indications on tasks execution and methodology:

Use of data sources

The research will build on the most recent data available, using statistics and surveys at national and European level. Should there be relatively high uncertainty about the validity of the findings due to data limitation, the Contractor shall refine the projections for a group of countries on which detailed sets of data are available.

Projection

The Contractor will use appropriate statistical models to project demographic trends (medium/long term) in VET and present them in quantitative figures (including different scenarios) accompanied by a discussion of the results and policy implications.

Geographical framework

The study will cover 25 EU Member States, three countries of European Economic Area (EEA) and, if possible, four candidate countries (32 countries in total). Comparisons with non-EU countries of relevant issues (e.g. Australia, Canada, China, India, Japan, Korea, USA) should support the study, if feasible (but not necessarily quantitative).

Time period

The study should present a forecast until at least 2020, with intermediate results for 2010 and 2015. Long-term projection (e.g. up to 2050) is optional.

2.3 Deliverables, timetables, costs

2.3.1 Reports: structure, length, requirements

The Contractor is required to submit:

- **an interim report** of approximately 10-20 pages, which will include:
 - the structure of the final report
 - theoretical background and results of data survey on countries
 - intermediary findings and indicative conclusions
 - information on problems encountered, solutions found or proposed and impact on future work
- **a draft final report** and a **final report** of approximately 40 pages (without annex) which will include:
 - an executive summary
 - rationale and theoretical analysis

- description of methodology, approach and data sources
- presentation of findings
- conclusions and recommendations

annex:

- bibliography, statistical sources used
- full set of data used and other additional relevant information, e.g. methodological details

Cedefop will provide **comments** on both, the interim and the draft final report. The Contractor will take account of these comments in close communication with Cedefop project manager. Payment of the balance is conditional upon acceptance of a revised final report by Cedefop.

The Contractor will submit the reports in **English, in hard copy and in electronic format** (Word/ Excel). The electronic files must correspond fully to the hardcopies. The tables, figures, graphs created in Word/ Excel (as appropriate) should also be made available as separate files and include the data used in order to reproduce the figures.

The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual which will form part of the contract.

2.3.2 Timetable of interim and (draft) final reports:

The Contractor is required to submit

- **the interim report:** **within 3 months** of the date on which the contract is signed
- **the draft final report:** **6 months** after the date the contract is signed
- **the final report:** **7 months** after the date the contract is signed.

To **support Cedefop in collecting background analysis for the review of the Maastricht priorities during the Education Ministers' meeting in December 2006** (see section A), the Contractor will provide early findings in **summer 2006**. Depending on the date of signature of the contract, these early findings may be integrated in the interim report.

2.3.3 Meetings

The Contractor will be invited to participate in two meetings which will take place in Thessaloniki:

- (1) upon delivery of interim report when the results will be discussed
- (2) 6 months after the date the contract is signed, presumably in October 2006

Travel expenses for meetings will be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract).

Other travel expenses that may occur in liaison with carrying out the tasks related to the contract have to be included in the financial offer.

2.3.4 Maximum budget

Maximum budget foreseen: 24 000 EUR

2.4 Selection criteria

2.4.1 Technical and professional capacity

The Tenderer must comply with the following criteria:

- qualifications, knowledge and ability of the Contractor/s and the key experts to perform the tasks outlined in 2.2.1
- professional experience in the areas covered by this study
- experience in comparative studies at international level
- capacity to access quantitative and qualitative data at national and EU/international level related to the theme
- linguistic ability

2.4.2 Evidence of the technical and professional capacity

The Tenderer must provide the following documents as evidence of the technical and professional capacity in compliance with 2.4.1:

- detailed CVs of the Contractor/s and key expert(s) with a brief description of research output/ list of publications related to the theme of this lot, including evidence of carrying out forecasting exercises at international level
- list of major contracts/studies performed in the past three years with dates and recipients
- description of the measures employed to ensure the quality of services, and a description of the Contractor's study and research facilities (including technical equipment and tools to be employed by the Contractor for performing the contract)
- evidence of capacity to access quantitative and qualitative data at national and EU/international level related to the theme
- an indication of the proportion of the contract which the service provider may intend to subcontract

2.5 Award criteria

2.5.1 Quality evaluation

The quality of the tender will be assessed on the basis of the following award criteria and weighting:

Quality criteria

- a) Level of understanding of the nature of the proposed study, its context and results to be achieved (**30 points**)
 - a.1) conceptual approach in line with the overall purpose of the tender and the objective of lot 2 (15 points)

- a.2) adequacy of the proposed issues and the scope and form of the study (15 points)
- b) Quality and appropriateness of the methodological approach: relevance and appropriateness of data sources and data collection and the methodology (statistical tools) proposed to meet the requirements outlined in the technical specifications (see 2.2.1) **(40 points)**
- c) Organisation and management of the study **(30 points)**
- c.1) organisational approach and working methods (10 points)
- c.2) type and degree of involvement of the proposed expert(s) (10 points)
- c.3) capacity to perform the tasks within the deadline given (10 points)

Evidence to be provided for lot 2

The Tenderer for lot 2 must present the following documents:

- a description of the conceptual approach for undertaking the study, issues to be addressed (see 2.2.1), and nature of the results to be achieved
- a detailed description of the planned methodological approach including a list of potential data sources and statistical tools to be used
- a detailed work plan illustrating intended organisation and management of the study; it will include:
 - indicative time-table with description of the deliverables (please refer to point 2.3.1)
 - a list of team members (if applicable) together with an explanation of the nature and extent of their participation in the study

2.5.2 Financial evaluation

The financial offer will be assessed on the basis of the total price of the tender. The Tenderer/s must provide a breakdown of the prices filling in the form in Annex V.

3. LOT 3: TAPPING THE POTENTIAL WITHIN – IN WHAT WAY CAN VET POLICIES FOSTER THE SOCIAL AND LABOUR MARKET INTEGRATION OF IMMIGRANTS AND THEIR DESCENDANTS?

3.1 Context and objectives

The Maastricht study (Leney, T et al, 2004) and the Cedefop synthesis (Tessaring & Wannan, 2004) concluded that VET has a crucial role in social and labour market integration. ‘Further development of VET systems to meet the needs of people or groups at risk of labour market and social exclusion’ is one of the national priority areas identified in the Maastricht Communiqué. Migrants are one of the target groups specifically mentioned in this priority area.

Education and training has been recognised as a means for social inclusion in a number of EU-level documents: e.g. the 2003 Employment policy guidelines which required the Member States to focus on integrating groups with particular difficulties on the labour market and the common objectives to combat social exclusion agreed upon by the Member States. In its Communication on immigration, integration and employment (2003), the Commission referred to education and integration into the labour market as one of the key elements of holistic immigration policies. The 2005-2008 Integrated guidelines for growth and employment reiterate this stance.

The potential of migrants and other disadvantaged groups is still insufficiently recognised (see Joint employment report 2004/2005). Improving migrants’ integration in the labour market requires breaking the vicious circle of low skill level giving access to sectors and jobs, which in turn, offer poor chances of improving their skills (First annual report on migration and integration, 2004). This issue is of increasing importance, as exclusion from the labour market and equity disparities in education and training are of growing concern while, at the same time, demographic trends are changing the structure of the EU population. Some countries are developing specific integration policies that focus on assimilation and access to the labour market and include language training, literacy programmes or vocational guidance. The burden, however, is often placed on the individuals to adapt. Systematic policies to address the problem, as for instance better access to VET, recognition and validation of skills seem to be lacking.

The role of VET in supporting EU immigrants to integrate in the social environment and the labour market of the recipient countries and thus to tap their potential requires more careful consideration and investigation

Hence, the purpose of this study is to provide a better understanding of how VET policies and accompanying packages can contribute to

- encouraging immigrants to take up/continue learning and thus to develop their skills and competences
- preventing them from dropping out of education
- supporting their social and labour market integration

3.2 Specific objectives and tasks of the Contractor

With this study, CEDEFOP aims to provoke and inform the debate and to provide evidence for mutual policy learning.

To this end the study should

- identify and examine EU Member states with a large share of immigrants in their populations/or well established policies and initiatives related to the theme of this study
- analyse how VET and related policies/measures/initiatives are used to cater for the specific needs of immigrants and their descendants;
- identify and examine statistical data to support evidence-based policy making; discuss if and in what way policy measures are based on the available statistical data and research findings
- identify common challenges and discuss practices or models in VET that have proved successful or not and why
- compare EU policies and practices to those applied e.g. in Australia, Canada or the USA

3.2.1 Tasks of the Contractor

Description of tasks:

- Briefly outline the current situation in EU Member States with a large share of immigrants in their populations/or well established policies and initiatives related to the theme of this study:
 - present relevant statistical data and compare them to those of non-migrants, where applicable e.g. number of immigrants, countries of origin, education and training characteristics (e.g. attainment levels, involvement in IVET, CVT, ;labour market measures), employment/unemployment characteristics
 - discuss barriers that immigrants and their descendants face in accessing and/or continuing learning/training
- Examine and analyse existing strategies/policies/initiatives to overcome these barriers and to promote social and labour market integration of immigrants with a particular emphasis on
 - vocational education and training and related social and labour market policies
 - integrated and accompanying measures (comprehensive social integration strategies in the recipient countries, language learning, guidance and counselling, support structures incl. services by non-profit organisations, financial incentives)
 - long term strategies to widen access to and to promote continuation of learning and competence development for migrants and their descendants
 - identification and validation of their prior learning

- learning conducive environments (e.g. organisational framework, delivery of programmes) and specifically targeted learning methodologies
 - assistance with transition from learning to work
- Identify and describe practices or models that can illustrate reasons for success or failure.
 - Compare policy and practice initiatives in the EU countries to those applied e.g. in Australia, Canada, the USA.
 - Summarise and discuss the findings of the study
 - suggesting how statistical data can/could support evidence-based policy making
 - illustrating in what way VET can contribute to tapping immigrants' skills potential and to fostering their social and labour market integration
 - drawing lessons from EU and non-EU countries to support EU Member States in mutual policy learning. The policy implications should refer to the Lisbon objectives, in particular the Copenhagen-Maastricht process, and indicate potential priorities beyond 2010.

Execution of tasks/methodology:

Collection of data

Build on the most recent comparable data available by exploring data sources at national, European and international level and drawing on the most relevant literature in the field.

Geographical framework

Based on the availability of data, select EU Member States with large immigrant populations and/or well established policies and initiatives related to the theme of this study. Complement the study with comparative information from non-EU countries within Europe and beyond (e.g. Australia, Canada, USA).

Analysis approach

The study should form a compilation of individual country reports/overviews but analyse and discuss the above issues applying a comparative approach across countries. However, country-specific information should be included where appropriate/of particular interest. While drawing on related studies, authors should avoid duplication. Tenderers may propose additional issues according to their expertise and/ or recent research developments.

3.3 Deliverables, timetables, costs

3.3.1 Reports: structure, length, requirements

The Contractor is required to submit:

- **interim report** of approximately 10-20 pages, will include:
 - structure of the final report
 - rationale for the choice of countries to be examined and data sources to be used
 - results of the data surveys
 - intermediary research findings and indicative conclusions
 - information on challenges encountered, solutions found or proposed and impact on future work
- **draft final report** and a **final report** of approximately. **60 pages** (without annex), will include:
 - executive summary
 - theoretical analysis and rationale
 - description of methodology
 - presentation of findings
 - conclusions and recommendations
 annex:
 - list of literature reviewed and statistical sources used
 - full set of data used and other additional relevant information, e.g. methodological details

3.3.2 Timetable of interim and (draft) final reports:

The Contractor is required to submit

- **the interim report** **within 3 months** of the date on which the contract is signed.
- **the draft final report** **6 months** after the date the contract is signed
- **the final report** **7 months** after the date the contact is signed.

To support Cedefop in collecting background analysis for the review of the Maastricht priorities during the Education Ministers' meeting in December 2006 (see section A), the Contractor will provide **early findings in summer 2006**. Depending on the date of signature of the contract, these early findings may be integrated in the interim report.

Cedefop will provide **comments** on both, the interim and the draft final report. The Contractor will take these comments into account and closely cooperate with the Cedefop project manager. Payment is conditional upon acceptance of a revised final report by Cedefop.

The Contractor will submit the reports in **English, in hardcopy and in electronic format** (Word/ Excel). The electronic files should correspond fully to the hardcopies. The tables, figures, graphs created in Word/ Excel (as appropriate) should also be made available as separate files and include the data used in order to reproduce the figures.

The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop’s style manual which will form part of the contract.

3.3.3 Meetings

The Contractor will be invited to participate in two meetings which will take place in Thessaloniki:

- (1) upon delivery of interim report when the results will be discussed
- (2) 6 months after the date the contract is signed, presumably in October 2006

Travel expenses for meetings will be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract).

Other travel expenses that may occur in liaison with carrying out the tasks related to the contract have to be included in the financial offer.

3.3.4 Maximum budget

Maximum budget foreseen: 38 000 EUR

3.4 Selection criteria

3.4.1 Technical and professional capacity

The Tenderer must comply with the following criteria:

- qualifications, knowledge and ability of the Contractor/s and the key experts to perform the tasks outlined in 3.2.1
- professional experience in the areas covered by this study
- experience in comparative studies at international level
- capacity to access data and expertise world-wide
- linguistic ability

3.4.2 Evidence of the technical and professional capacity

The Tenderer must provide the following documents as evidence of the technical and professional capacity in compliance with 3.4.1:

- detailed CVs of the Contractor/s and key expert(s) with a brief description of research output/publications related to the theme of this lot and evidence of experience in comparative studies at international level

- list of major contracts/studies performed in the past three years with dates and recipients
- description of the technical equipment and tools to be employed by the Contractor for performing the contract
- description of the measures employed to ensure the quality of services, and a description of the Contractor's study and research facilities; including evidence of capacity to access data and expertise at EU level and beyond
- an indication of the proportion of the contract which the service provider may intend to subcontract.

3.5 Award criteria

3.5.1 Quality evaluation

The quality of the tender will be assessed on the basis of the following award criteria and weighting:

Quality criteria

- a) Level of understanding of the nature of the proposed study, its context and results to be achieved **(30 points)**
 - a.1) conceptual approach in line with the overall purpose of the tender and the objective of lot 3 (15 points)
 - a.2) adequacy of the proposed issues and the scope and form of the study; rationale for proposed additional issues (see 3.2.1) (15 points)
- b) Quality and appropriateness of the approach suggested to carry out the analysis, i.e.: relevance and appropriateness of the way in which the analysis will be undertaken (e.g. envisaged steps, data sources to be used) to meet the requirements outlined in the technical specifications (see 3.2.1) **(40 points)**
- c) Organisation and management of the study **(30 points)**
 - c.1) organisational approach and working methods (10 points)
 - c.2) type and degree of involvement of the proposed expert(s) (10 points)
 - c.3) capacity to perform the tasks within the deadline given (10 points)

Evidence to be provided for lot 3

The Tenderer for lot 3 must present the following documents:

- a list of potential data sources and
- a description of the conceptual approach for undertaking the study, issues to be addressed and potential suggestions for additional issues (see 3.2.1), and nature of the results to be achieved.
- suggestions of countries to be examined, potential data sources to be used and the rationale for the choice;
- a detailed description of the envisaged approach for the required analysis

- a detailed work plan illustrating intended organisation and management of the study; it will include:
 - indicative time-table with description of the deliverables (please refer to point 3.3.2)
 - a list of team members (if applicable) together with an explanation of the nature and extent of their participation in the study

3.5.2 Financial evaluation

The financial offer will be assessed on the basis of the total price of the tender. The Tenderer/s must provide a breakdown of the prices filling in the form in Annex V.

4. LOT 4: LOW SKILLED PEOPLE IN THE EUROPEAN AND GLOBAL LABOUR MARKET

4.1 Context and objective

The objective of this lot is to provide Cedefop with a study that will contribute to its fourth research report on vocational education and training research as outlined in A 2.2.

As a contribution to Cedefop's fourth research report this study will also contribute to Cedefop's background analysis for the review of the Maastricht priorities which will take place during the Education Ministers' meeting in December 2006 (see A 1.1 and 1.2).

The Maastricht Communiqué drew the Member States' attention to the large number of EU citizens with low educational attainment. The 2003 guidelines for employment policies and the 2005-2008 integrated guidelines for growth and employment also reiterate the need to cater for the low-skilled. The latest Labour Force Survey 2004 shows that more than 30% of the EU working age population, i.e. 75 million people can be considered low skilled according to the current definition (less than upper secondary education or ISCED 3).

The aim of this study is to discuss the concept and characteristics of 'low skilled' in EU countries and to refine the definition of 'low skilled people' in different countries and in the EU.

4.2 Specific objectives and tasks of the Contractor

The European definition of low skilled includes all those who have an educational attainment level below upper secondary education (based on the ISCED classification). This definition may not be appropriate to take into account the various Member States' labour markets. It may also not be appropriate to reflect the way experience and skills/competences beyond formal qualifications may be developed or lost, recognised or valorised through lifelong learning and on the labour market.

The study will also propose (a) better definition(s) and indicator(s) to be used at European level to characterise the low skilled (e.g. combination of educational attainment and literacy/numeracy levels).

To do so the study should address questions such as the following:

What would be a proper definition of low skilled people? Do the current statistics and indicators provide for this? What model could be recommended to arrive at a more refined estimate? In what way do employment and unemployment rates influence the percentage of low skilled? Is it possible to arrive at a more integrated picture on skills, qualifications and competences taking into account formal qualifications, lifelong learning, work experience, etc.? Can we gain a picture of skill acquisition or losses during people's lives?

This contribution should serve to

- better identify (both qualitatively and quantitatively) the notion of 'low skilled' in EU countries, thus
- refining the estimate of low skilled and
- identifying more targeted/better adapted measures by countries to 'upskill' them.

Further remarks:

The study should refer to the discussion in the second research report (Descy and Tessaring, 2001) and Leney et al. (2004) and to other international comparisons of qualifications.

4.3 Deliverables, timetables, costs**4.3.1 Reports: structure, length, requirements**

The final deliverable is a contribution to the fourth research report, drafted in English (preferably), French or German.

The Contractor is required to submit:

- an **interim report** presenting the structure of the final contribution, intermediary findings and indicative conclusions.
- a **draft final report** and a **final report** of around 40 pages (without bibliography and annexes) following the structure below:
 1. Abstract (1-2 pages)
 2. Main text (20 – 30 pages), including:
 - Rationale and objectives in the specific field, with reference to VET;
 - Theoretical and socio-economic/pedagogic background, incl. a literature review;
 - Theories, concepts and methods;
 - Presentation and critical interpretation of research findings.
 3. Conclusions for research, policy, evaluation practice (5 - 10 pages)
 4. Summary (2-5 pages)
 5. Bibliography and references
 6. Annex giving additional relevant information (e.g. databases, networks, institutions, documentation centres)

Cedefop will provide **comments** on both, the interim and the draft final report. The Contractor will address these comments in close communication with Cedefop project manager. **Payment of the balance is conditional on the acceptance of a revised final contribution by Cedefop.**

The Contractor will submit the texts in hardcopy as well as on CDRrom or by e-mail in Word. Figures and tables should be presented separately in Excel or in Word, as appropriate. Electronic files have to correspond fully to the hard copy.

The layout and format of the text - in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual which will form part of the contract.

4.3.2 Timetable of interim and (draft) final reports:

The Contractor is required to submit:

- **the interim report** **within 3 months** of the date in which the contract is signed
- **the draft final report** **6 months** after the date the contract is signed
- **the final report** **7 months** after the date the contract is signed

To support Cedefop in collecting background analyses for the review of the Maastricht priorities during the Education Ministers' meeting in December 2006 (see section A), the Contractor will provide **early findings in summer 2006** (depending on the date of signature of the contract, these early findings may be integrated in the interim report).

4.3.3 Meetings

The Contractor is required to participate in one meeting which will take place in Thessaloniki in October 2006. In this meeting all contributors to the fourth research report will present the results of their work - which in the case of this lot may still not be finalised - to a broad audience.

In consultation with the Cedefop project manager other meetings may be organised if considered necessary for the good execution of the contractual tasks.

Travel expenses for meetings will be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract).

Other travel expenses that may occur in liaison with carrying out the tasks related to the contract have to be included in the financial offer.

4.3.4 Maximum budget

Maximum budget foreseen: 17.500 EUR

4.4 Selection criteria

4.4.1 Technical and professional capacity

The Tenderer must comply in terms of technical and professional capacity :

- Qualifications, knowledge and ability of the Contractor and/or the key experts to perform the tasks outlined in 4.2;
- Professional experience in the areas covered by this study, incl. comparative studies at international level, attested by a list of scientific publications and a list of research projects;
- Capacity to access data and expertise world-wide;
- Linguistic ability.

4.4.2 Evidence of the technical and professional capacity

The Tenderer must provide the following documents as evidence of the technical and professional capacity in compliance with 4.4.1:

- detailed CVs of the Contractor/s and key expert(s) plus a list of scientific publications, incl. related to the theme of this lot and providing evidence of experience in comparative studies at international level;
- list of major contracts/research projects performed in the past three years with dates and recipients;
- description of the measures to ensure the quality of services, and a description of the Contractor's study and research facilities (incl. technical equipment and tools to be used for performing the contract);

- an indication of the proportion of the contract which the service provider may intend to subcontract and if applicable proof of technical and professional capacity of subcontractors.

4.5 Award criteria

4.5.1 Quality evaluation

The quality of the tender will be assessed on the basis of the following award criteria and weighting:

Quality criteria

- a) Demonstration of an in-depth understanding of the concepts and research issues at stake in the proposed study **(30 points)**
- b) Adequacy of the content, issues and scope of the proposed study with regards to 4.1 and 4.2 **(30 points)**
- c) Relevance of the methodology and organisation of the work for carrying out the study including the demonstrated capacity to perform the agreed task **(20 points)**
- d) Relevance of the proposal to the general objectives of research reporting at Cedefop and to the specific objectives and theme of the fourth research report as outlined in section A **(20 points)**

Evidence to be provided for lot 4

The Tenderer for lot 4 must present the following documents:

- a brief discussion of the subject of the lot demonstrating in depth understanding of the concepts and research issues at stake in the proposed study;
- a description of the envisaged content of the study, issues to be addressed and scope of the work, with reference 4.1. and 4.2 and A 2.2. (Tenderers may, according to recent developments in research and/or research expertise, propose additional issues or adjust the focus of the study)
- a detailed methodology and workplan describing the way the Tenderer will perform the required work, taking into account the deliverables mentioned in 4.3.

4.5.2 Financial evaluation

The financial offer will be assessed on the basis of the total price of the tender. The Tenderer/s must provide a breakdown of the prices filling in the form in Annex V.

5. LOT 5: IMPROVING THE ATTRACTIVENESS AND THE IMAGE OF VET

5.1 Context and objective

The objective of this lot is to provide Cedefop with a study that will contribute to its fourth research report on vocational education and training research as outlined in A 2.2.

As a contribution to Cedefop's fourth research report this study will also contribute to Cedefop's background analysis for the review of the Maastricht priorities which will take place during the Education Ministers' meeting in December 2006 (see A 1.1 and 1.2). In this respect, it will have to comply with the requirements for research report contributions outlined in A 2.

Several countries have reformed their VET system to increase its attractiveness for students and parents and its standing on the labour market. These reforms have been described by several studies, which were summarised in the second research report (Lasonen and Manning, 2001; Descy and Tessaring, 2001). More recently, the so-called 'Maastricht study' (Leney et al., 2004) discussed national strategies and results from research related to raising the attractiveness of VET.

Given the political emphasis attributed to improving the image and attractiveness of VET in the Maastricht communiqué, it is worth revisiting the issue to update and complement previous studies, identify new strategies, assess whether reforms implemented led to the expected results and discuss reasons for failure and unexpected results.

Hence, the purpose of this study is to examine policy strategies for improving the attractiveness and image of VET.

5.2 Specific objectives and tasks of the Contractor

The contribution should bring together various strands of comparative and other research to discuss two *dimensions* of attractiveness:

1. *attracting various groups of people to and retaining them in the education and training system* through reforming VET curricula, improving pathways and bridges to general education and access to higher education, through targeted measures to prevent drop out and early school leaving, etc.;
2. *delivering qualifications and skills valued on the labour market*, by upgrading VET curricula, by involving employers in VET curricular design, by developing apprenticeships and dual qualifications, by improving transparency of qualifications, etc.

While dealing with the above issues, the contribution should take a *differentiated approach to the various types of VET between and within countries* and also, if possible, *differentiate across sectors* (e.g. VET qualifications may in some sectors be more valued and successful than in others).

Taking a differentiated approach also means *considering the role of VET in different countries' education, production and social systems* and to address questions such as: can the same indicators of attractiveness be used across countries? Is the strategic role of VET in various countries identical and changing with the transition to a knowledge society?

Methodology and further considerations

- The above questions should be discussed applying a comparative approach across countries. It is recognised that achieving a full coverage of EU countries would be difficult in the context of this study; however, a balanced coverage should be sought.
- The contribution should expand previous research work on the issue and collect new evidence wherever possible.
- Evaluation results of VET reforms in various countries should be used, where available and relevant.
- When discussing success or failure of current reforms, the contribution may consider insights provided by other strands of research, such as research on transition from school to work or individual biographies.
- Discussion of policies/issues in EU competitor countries linked to the image and attractiveness of VET and comparison with those in EU countries will be considered a plus.
- While the study should draw on previous research reports and the ‘Maastricht study’, authors should avoid duplication.
- Links and collaboration with other research teams preparing contributions for the fourth research report will be necessary (see A 2.2 Cedefop will provide the necessary contacts).

5.3 Deliverables, timetables, costs

5.3.1 Reports: structure, length, requirements

The final deliverable is a written contribution to the fourth research report, drafted in English (preferably), French or German.

The Contractor is required to submit:

- an **interim report** presenting the structure of the final contribution, intermediary findings and indicative conclusions.
- a **draft final report** and a **final report** of around 60 pages (without bibliography and annexes) and follow the structure below:
 1. Abstract (1-2 pages)
 2. Main text (40 – 50 pages), including:
 - Rationale and objectives in the specific field, with reference to VET;
 - Theoretical and socio-economic/pedagogic background, incl. a literature review;
 - Theories, concepts and methods;
 - Presentation and critical interpretation of research findings.
 3. Conclusions for research, policy, evaluation practice (up to 10 pages)
 4. Summary (2-5 pages)
 5. Bibliography and references
 6. Annexes giving additional relevant information (e.g. databases, networks, institutions, documentation centres)

Cedefop will provide **comments** on both, the interim and the draft final report. The Contractor will address these comments in close communication with Cedefop project manager. **Payment of the balance is conditional on the acceptance of a revised final contribution by Cedefop.**

The Contractor will submit the texts in hardcopy as well as on CD-ROM or by e-mail in Word. Figures and tables should be presented separately in Excel or in Word, as appropriate. Electronic files have to correspond fully to the hard copy.

The layout and format of the text - in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual which will form part of the contract.

5.3.2 Timetable of interim and (draft) final reports:

The Contractor is required to submit:

- **the interim report** **within 4 months** of the date in which the contract is signed
- **the draft final report** **9 months** after the date the contract is signed
- **the final report** **10 months** after the date the contract is signed

Payment of the balance is conditional on the acceptance of a revised final contribution by Cedefop.

To support Cedefop in collecting background analysis for the review of the Maastricht priorities during the Education Ministers' meeting in December 2006 (see Section A), the Contractor will provide early findings in summer 2006. Depending on the date of signature of the contract, these early findings may be integrated in the interim report.

5.3.3 Meetings

The Contractor is required to participate in one meeting which will take place in Thessaloniki in October 2006. In this meeting all contributors to the fourth research report will present the results of their work - which in the case of this lot may still not be finalised - to a broad audience.

In consultation with the Cedefop project manager other meetings may be organised if considered necessary for the good execution of the contractual tasks.

Travel expenses for meetings will be reimbursed by Cedefop separately, according to its regulation (see Annex II of the draft contract).

Other travel expenses that may occur in liaison with carrying out the tasks related to the contract have to be included in the financial offer.

5.3.4 Maximum budget

Maximum budget foreseen: 30.000 EUR

5.4 Selection criteria

5.4.1 Technical and professional capacity

The Tenderer must comply in terms of technical and professional capacity :

- Qualifications, knowledge and ability of the Contractor and/or the key experts to perform the tasks outlined in 5.2;
- Professional experience in the areas covered by this study, incl. comparative studies at international level, attested by a list of scientific publications and a list of research projects;
- Capacity to access data and expertise world-wide;
- Linguistic ability.

5.4.2. Evidence of the technical and professional capacity

The Tenderer must provide the following documents as evidence of the technical and professional capacity in compliance with 5.4.1:

- detailed CVs of the Contractor/s and key expert(s) plus a list of scientific publications, incl. related to the theme of this lot and providing evidence of experience in comparative studies at international level;
- list of major contracts/research projects performed in the past three years with dates and recipients;
- description of the measures to ensure the quality of services, and a description of the Contractor's study and research facilities (incl. technical equipment and tools to be used for performing the contract);
- an indication of the proportion of the contract which the service provider may intend to subcontract and if applicable proof of technical and professional capacity of subContractors.

5.5 Award criteria

5.5.1 Quality evaluation

The quality of the tender will be assessed on the basis of the following award criteria and weighting:

Quality criteria

- a) Demonstration of an in-depth understanding of the concepts and research issues at stake in the proposed study **(30 points)**
- b) Adequacy of the content, issues and scope of the proposed study with regards to 5.1 and 5.2 **(30 points)**
- c) Relevance of the methodology and organisation of the work for carrying out the study including the demonstrated capacity to perform the agreed task **(20 points)**
- b) Relevance of the proposal to the general objectives of research reporting at Cedefop and to the specific objectives and theme of the fourth research report as outlined in section A **(20 points)**

Evidence to be provided for lot 5

The Tenderer for lot 5 must present the following documents:

- a brief discussion of the subject of the lot demonstrating in depth understanding of the concepts and research issues at stake in the proposed study;
- a description of the envisaged content of the study, issues to be addressed and scope of the work, with reference 5.1. and 5.2 and A 2.2. (Tenderers may, according to recent developments in research and/or research expertise, propose additional issues or adjust the focus of the study)

- a detailed methodology and workplan describing the way the Tenderer will perform the required work, taking into account the deliverables mentioned in 5.3.

5.5.2 Financial evaluation

The financial offer will be assessed on the basis of the total price of the tender. The Tenderer/s must provide a breakdown of the prices filling in the form in Annex V.