



CEDEFOP

European Centre for the Development
of Vocational Training

Area Resources - Finance and Procurement, Procurement Service

Thessaloniki, 27/07/2011
RS/PRO/DELE/2011/0557**OPEN INVITATION TO TENDER****AO/ECVL/ILEMO/Unitisation&Modularisation/011/11****‘Unitisation and modularisation for flexibility and mobility in VET’****Ref.: Contract notice - 2011/S 142-235047 of 27/07/2011**

Dear Sir/Madam,

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

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

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

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

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

Important:

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

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

Do not attach your offer to any of the above information e-mail or fax.

or

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

or

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

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

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
123, Europe Str, GR-57001 Thessaloniki-Pylea,
PO Box 22 427 - Greece
Tel: +30 2310 490111 / 490 064**

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

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

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

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

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

OPEN INVITATION TO TENDER

CEDEFOP No: AO/ECVL/IEMO/Unitisation&Modularisation/011/11

‘Unitisation and modularisation for flexibility and mobility in VET’

Name of tenderer:

NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

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

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

Before the final date for submission of tenders:

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

Requests for additional information/clarification should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

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

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

After the final date for submission of tenders:

- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the final date for submission of tenders.
- Tenderers should not amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this will lead to rejection of the tender. Any such need identified by the Evaluation Committee will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

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.
- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the tenders have been opened.
- If the supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification if this might alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. The tenderers' replies must serve solely the purpose to provide the Evaluation Committee with a clarification regarding the offer in relation to the technical proposal or concerning obvious clerical errors in the financial offer. Neither the technical content of the tender nor the financial offer may be changed.
- In case the tenderer alters the total financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	16/09/2011	< N/A >
Last date on which clarifications are issued by Cedefop	< as soon as possible >	< N/A >
Deadline for submission of tenders (hand delivered)	27/09/2011	17h00 >
Deadline for submission of tenders by post / courier	27/09/2011	< N/A >
Validity of the tenders	27/03/2012	< N/A >
Tender opening session	11/10/2011	11h00

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

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

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

10. All costs incurred in preparing and submitting tenders are borne by the tenderers.
11. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.

12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful tenderer.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at: http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.

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

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

Yours sincerely,

signed George Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/ILEMO/ Unitisation&Modularisation/011/11

‘Unitisation and modularisation for flexibility and mobility in VET’

Tender Specifications

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Introduction to Cedefop

Strengthening European cooperation in vocational education and training policy

- 1) Founded in 1975 (1) and based in Greece since 1995, the European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union (EU) supporting European vocational education and training (VET) policy development. Its strategic objective for 2009-11 (2) is to 'contribute to excellence in VET and strengthen European cooperation in developing, implementing and evaluating European VET policy'.
- 2) This strategic objective is supported by four priorities, namely:
 - (a) informing European VET policies;
 - (b) interpreting European trends in and challenges for skills, competences and learning;
 - (c) assessing VET's benefits;
 - (d) raising the profile of VET.
- 3) Cedefop supports the European Commission, Member States (as well as the associated countries of Iceland and Norway) and social partners by:
 - (a) using its expertise, gathered through research, analysis and networking, to identify trends and challenges and propose ideas for VET policies;
 - (b) bringing together policy-makers, social partners, researchers and practitioners to share ideas and debate proposals on the best ways to tackle the challenges we face;
 - (c) encouraging European approaches, principles and tools to improve training and achieve common aims;
 - (d) raising awareness and understanding of how vocational education and training is evolving, and how it contributes to lifelong learning and other policies;
 - (e) disseminating information through websites, publications, networks, study visits, conferences and seminars.

Cedefop carries out its role through the tasks set out in its founding regulation. It disseminates information through its website, publications, networks, study visits, conferences and seminars.

(¹) Council Regulation of 10 February 1975 establishing a European Centre for the Development of Vocational Training (Cedefop) EEC No 337/75, *Official Journal of the European Communities* L39, 13.2.1975 as last amended by Council Regulation EC No. 2051/2004.

(²) Cedefop, *Enhancing European cooperation in vocational education through evidence and expertise: continuity, focus and flexibility - Cedefop's medium-term priorities 2009-11*.

Informing European VET policies

- 4) Cedefop analyses and reports on the policies Member States are putting in place to provide the skills we need.
- 5) Cedefop is helping to design, develop and implement joint European approaches. For example, Cedefop is supporting work on tools such as Europass, the European qualifications framework and European credit system for vocational education and training to make it easier to study and work in another Member State. Cedefop is also helping develop common European principles for validating non-formal learning, improving vocational guidance, and assuring the quality of training.
- 6) All of these aim to help people to keep learning throughout their careers, and make use of all their learning, regardless of how it has been acquired.

Interpreting European trends in skills and learning

- 7) Cedefop is working on a common approach to forecasting demand and supply of skills in Europe. We need to understand more about how the demand for skills will change and how this affects what we need to learn. The better we can anticipate skill needs, the better our policies will be.
- 8) Cedefop is also examining how people acquire knowledge and skills and how this learning is measured. Valuable and relevant learning takes place in different settings, including work, during leisure time and abroad, as well as at schools, colleges and universities. Cedefop is looking at what this means for institutions, curricula, teaching and training and for assessing knowledge and skills.

Assessing the benefits of vocational education and training

- 9) Investment by firms to develop skills can lead to greater productivity, profitability and even stock market performance. Individuals also benefit from training, as it helps workers improve their career and employment prospects, and protects those who are marginalised or otherwise at risk. Yet public and private investment in skills is relatively low in Europe.
- 10) Demonstrating the positive returns to vocational education and training may encourage both enterprises and individuals to invest in it. Cedefop is also looking at the best ways to measure investment in training to calculate its benefits, and at ways of using statistics and developing new benchmarks and indicators.

Raising the profile of vocational education and training

- 11) Training is more fragmented than general education and so is not always heard. To raise the profile of training and increase awareness of its role in lifelong learning, Cedefop disseminates clear, reliable, timely, and - where possible - comparable information to its target groups, namely policy-makers, researchers and practitioners, through electronic and printed media.
- 12) One of the best ways to disseminate information about training is still through personal contact. Through its study visits and conferences, Cedefop brings together people with very different backgrounds and experience to learn from each other and generate new ideas.

Cedefop's information

13) Cedefop's web portal www.cedefop.europa.eu includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.

14) Information about Cedefop's publications, many of which can be downloaded, can be found at the <http://www.cedefop.europa.eu/EN/publications.aspx>. Cedefop's wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

15) Cedefop hosts and organises conferences and events throughout the year. Cedefop also manages several networks to exchange experience and debate, generate ideas and examine themes. These include Agora conferences, two or three are hosted in Thessaloniki each year. Study visits, short-term visits of three to five days for a small group of 10 to 15 specialists to examine a particular aspect of lifelong learning in another country. In working to improve VET, Cedefop cooperates with many organisations and has several networks to collect and disseminate information, exchange experience, stimulate debate and generate ideas. Cedefop's major networks include:

- (a) ReferNet (European network of reference and expertise in VET) is Cedefop's primary source of information on VET developments in Member States. ReferNet comprises national consortia consisting of representatives of VET organisations in each Member State led by a national coordinator;
- (b) Skillsnet (network on early identification of skill needs) brings together researchers, policy-makers, social partners and practitioners to exchange information about activities on skill needs analysis and anticipation at European and international levels;

Management, resources and internal controls

16) Cedefop's administration makes an important contribution to achieving Cedefop's operational objectives. It maintains the physical environment and ICT architecture and supports colleagues in procurement, contract and financial procedures. Further, in its dealings with outside organisations and contractors it projects Cedefop's image. Cedefop, in managing its human and financial resources, applies modern and efficient management techniques, in full compliance with the regulations.

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

1. Overview of this tender

In submitting his tender, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale may be, which he hereby waives. Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a tender containing all the required information and documentation may lead to the rejection of the tender. No account can be taken of any reservation expressed in the tender as regards the tender dossier (if necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender); any reservation may result in the immediate rejection of the tender without further evaluation.

1.1 Description and type of the contract

a) Title of the contract: **Unitisation and modularisation for flexibility and mobility in VET**

b) Short description of content of this contract:

The purpose of the contract is to understand and analyse unitisation and modularisation in VET and the interrelations between unitisation/modularisation and the implementation of credit arrangements for lifelong learning in Europe (incl. learners' mobility).

c) Type of contract: **Service contract**

1.2 Place of delivery or performance

The tasks must be completed outside Cedefop in the Contractor's premises.

1.3 Division into lots

This tender procedure **is not divided into lots**.

1.4 Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications.

1.5 Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **200,000 Euro (excluding VAT)**.

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party (estimated date **November-December 2011**), and shall have a duration of **eighteen (18) months**.

1.7 Main terms of financing and payment

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

2. Terms of Reference

2.1 Introduction

One of the difficulties for understanding of unitisation and modularisation is of terminological nature. Both terms might be used as synonymous and in many cases translation brings additional confusion. In many countries such as in Estonia or UK little differentiation in education and training is made between modules and units. Cedefop's terminology (2008³), however, differentiates between modules and units in the following way: *modules* are understood as components of education and training programmes whereas *units* are defined as a set of learning outcomes (knowledge, skills, and/or competences) which constitute a coherent part of a qualification.

These definitions underline that modularisation and unitisation processes may be initiated for different purposes and by different stakeholders. There are different possible dimensions to capture the nature of unitisation and modularisation among which the links to qualifications, the role of (occupational, qualification, educational) standards, legal framework, regulations for transfer and validation of learning outcomes, and the role assigned to units and/or modules in qualifications systems. On the one extreme we can see modularisation as a way of structuring teaching and training input in a way which ensures institutional flexibility and optimal use of teacher resources and learning resources. On the other extreme we can see unitisation as a way of opening up qualifications to individual learning outcomes and experiences. The relevance of this distinction is illustrated by the fact that learning outcomes based units do not automatically correspond to the way curricula and training programmes are organised through modules. While this distinction will be less clear-cut in the concrete solutions developed by Member States, it points to a possible tension between input and outcome based approaches and to the differing interests of education and training providers and individual learners. Unitisation of qualifications links to the learning outcomes approach increasingly used in qualifications development and design. The fact that a growing number of countries now allow individuals to have their non- and informally acquired learning assessed and recognised as part of a qualification, exemplifies an approach to units not building on institutionally pre-defined entities.

Modularisation and/or unitisation in VET are taken forward in most European countries to answer needs for flexibility and responsiveness to changes in the labour market and in individual learning paths. This also reflects the concern expressed in the Bruges Communiqué (2010) for integrating changing labour market needs into VET provision in the long term and the need to adapt VET content, infrastructure and methods regularly. Empowering individuals includes developing their capacity to adapt to changes, in the context where VET should contribute to employability and economic growth, and respond to broader societal challenges (Bruges, 2010⁴). The development of validation mechanisms and of mobility in education and training are two possible drivers for modularisation of VET programmes and unitisation of qualifications. Further rationales for developing modularisation are rationalisation and simplification of training systems and training offers, enabling access and progression (especially for disadvantaged groups), improving quality and supporting mobility (Stanwick 2009⁵; Pilz 2009⁶).

³ Cedefop (2008), Terminology of European education and training policy: A selection of 100 key terms. Luxembourg: Office for Official Publications of the European Communities.

Available at: <http://www.cedefop.europa.eu/EN/publications/13125.aspx>

⁴ Communiqué of the European Ministers for Vocational Education and Training, the European Social Partners and the European Commission, meeting in Bruges on 7 December 2010 to review the strategic approach and priorities of the Copenhagen process for 2011-2020

⁵ Stanwick, J. (2009). Modularisation and Modular Delivery of TVET. Chapter XVI.3 R. Mclean, D. Wilson (eds). International Handbook of education for the changing world of work, Springer, pp. 2792-2809.

Modularisation takes different shapes such as the reform of foundational courses of Danish VET programmes (Cort 2010⁷) or the modular apprenticeships scheme in Austria (ReferNet 2010). In Scotland for instance moving to a unitized, standards-based system was linked in the 80s to creating a qualifications systems which would be coherent (progression routes), comprehensible (choice of qualifications), current (relevant outcomes of learning), credible (forms of assessment); units as standards bundling learning outcomes are the basis for transfer and recognition of learning outcomes for qualification award (Hart 2009⁸). In Ireland, modularisation and the inclusion of smaller award types enable learners to build up units of learning at their own pace to meet their needs, refresh or add to their qualifications and update them in the context of new regulations (Cedefop 2010⁹). Debates are ongoing in the German speaking countries (Austria, Switzerland and Germany) about individualisation and increasing flexibility via modularisation (Pilz, 2009¹⁰; Ehrke 2005¹¹). In some circumstances modularisation and unit-based assessment have failed to offer the flexibility and increased access they promised (Allais, 2007¹²).

The issue of unitisation of qualifications has gained momentum with the development of credit arrangements based on learning outcomes and the progress made in the field of recognition and validation of non-formal and informal learning. The development of credit arrangements for transfer and accumulation of learning outcomes and more particularly the European Credit system for VET (ECVET) renews the interest for unitisation of qualifications in policy and practice. Within ECVET a unit is a component of a qualification, consisting of a coherent set of knowledge, skills and competence that can be assessed and validated. Furthermore, depending on the existing regulations, units may be common to several qualifications or specific to one particular qualification. Units are accumulated based on the requirements to achieve qualifications. These requirements may be more or less restrictive depending on the tradition and practice of qualifications systems and the way qualification standards are designed. ECVET is currently being experimented for enabling mobility in VET but also as part of larger VET reforms for lifelong learning and improved opportunities for recognition and validation of informal and non-formal learning (Cedefop 2010¹³). This set of objectives puts the relevant stakeholders in front of a dilemma on how far to develop unitisation and/or modularisation to sustain mobility and VET reforms, as well as how to deal with transfer and recognition of learning outcomes. Experimentations by ECVET pilot projects show that the issues of assessment, transfer and recognition of learning outcomes shall be considered from the very start of designing units of learning outcomes and linked to qualification awarding processes in place in VET and qualifications systems.

⁶ Pilz, M. (Ed.) (2009) *Modularisierungsansätze in der Berufsbildung. Deutschland, Österreich, Schweiz sowie Großbritannien im Vergleich*. Bielefeld: W. Bertelsmann Verlag.

⁷ Cort, P. (2010), *Education for All? Lessons from the Reform of the Danish VET-Programmes*, in: BWP 4/2010, pp. 38-42

⁸ Hart, J. (2009), *Developing a National System of Vocational Qualifications*. Chapter XVI.9 R. Mclean, D. Wilson (eds). *International Handbook of education for the changing world of work*, Springer, pp. 2881-2898.

⁹ Cedefop (2010a), *Changing qualifications: A review of qualifications policies and practices*, Cedefop Reference series; 84. Luxembourg: Publications Office of the European Union, 2010

¹⁰ Pilz (2009), as referenced above (footnote 6).

¹¹ Michael Ehrke: "Modularisierung" - Paradigmenwechsel in der Bildungspolitik? BdWi / fzs (Hg.): *Chancengleichheit qua Geburt? Bildungsbeteiligung in Zeiten der Privatisierung sozialer Risiken*, Marburg 2005

¹² Allais, Stephanie Matselang (2007). *Why the South African NQF failed: lessons for countries wanting to introduce national qualifications frameworks*. *European Journal of Education*, Vol. 42, No 4, p. 523-547.

¹³ Cedefop (2010b), *The development of ECVET in Europe*. Luxembourg: Publications Office of the European Union. Working paper No 10 http://www.cedefop.europa.eu/EN/Files/6110_en.pdf

The latest Cedefop study (2010¹⁴) reviewing changes in qualifications systems across Europe confirms that links between unitisation/modularisation and credit systems in VET are still to be clarified since the central question is of openness of qualification awarding processes to particular learning experiences.

2.2 General purpose

The first general purpose of the current study is to understand and analyse unitisation and modularisation in VET. This includes characterising national processes of unitisation and modularisation along different dimensions (for instance stakeholders' perspectives, role of legislations and regulations, input and outcomes based approaches to education and training) and the mapping of different solutions adopted in response to challenges.

A second general purpose is the analysis of the interrelation between unitisation/modularisation processes and the implementation of credit arrangements at Member States and European level. Further to establishing the dimensions of this interrelation, the leading question is how unitisation/modularisation can sustain the development and implementation of credit arrangements for geographical transnational learners' mobility and lifelong learning. Lifelong learning encompasses the opportunities for validating towards (full or partial) qualifications the outcomes of non-formal and informal learning. Unit-based and learning outcomes-oriented credit arrangements such as ECVET operate along a chain of activities including design of qualifications, design of programmes, design of assessment and validation, and leading to certification and recognition. Those activities are underpinned with specific quality assurance, governance and funding provisions (European Commission 2011¹⁵). Those aspects shall be taken into consideration.

The study shall consider VET in a selection of European Member States.

2.3 Research questions

The study includes three major issues; each of the issues shall be analysed for both processes of unitisation of qualifications and modularisation of programmes in initial and continuous VET (as far as applicable). Those issues are addressed hereafter in terms of questions that should be integrated in the study.

Issue 1: Analysis of existing unitisation and modularisation modes and processes in VET in Europe

What characterises unitisation and modularisation? How widespread are unitisation and modularisation in VET in Europe? Unitisation and modularisation might be introduced to answer needs by specific target groups (drop-outs, young learners, adult learners), specific qualification types (certificates, diplomas, licences) or specific qualification formats (full and partial qualifications) might be more in focus. Characterising unitisation/modularisation implies at this stage of the analysis relating to different regimes of VET systems and concepts of qualifications and estimate how unitisation/modularisation evolve in different VET regimes, for instance in relation to arrangements for validation of the outcomes of informal and non-formal learning.

¹⁴ Cedefop (2010a) as referenced above (footnote 9)

¹⁵ European Commission (2011). The European Credit System for Vocational Education and Training (ECVET). Get to know ECVET better: Questions and Answers. Revised February 2011
[http://www.cedefop.europa.eu/EN/files/ECVET_QUESTION_ANSWERS_Feb_2011_en\(download_ID_17648\).pdf](http://www.cedefop.europa.eu/EN/files/ECVET_QUESTION_ANSWERS_Feb_2011_en(download_ID_17648).pdf)

Issue 2: Analysis of impact of unitisation and modularisation on qualifications and VET systems

Starting with an analysis of the legal and regulatory amendments needed for unitisation and modularisation and the ways to introduce unitisation and modularisation (for instance the stakeholders involved at different stages of the development of unitisation/modularisation in VET) this issue concerns the scope of necessary changes to VET systems when unitisation/modularisation are introduced and the links between unitisation/modularisation and the learning outcomes approach. This can be expressed by the following: To what extent is the learning outcomes approach a starting point for unitisation/modularisation? To what extent are input factors decisive? How far could unitisation and modularisation pave the way to the introduction of credit systems and more particularly ECVET?

Issue 3: Linking unitisation and modularisation for crediting learning outcomes in the context of mobility and lifelong learning

The leading question is how far can mobility experience (in many ways an individually specific experience) be captured by predefined qualifications units and/or programme modules? Capturing mobility experiences implies enabling recording, assessing, transferring and validating the outcomes of diverse learning experiences. It includes assessing how far VET systems have to include unitisation and modularisation for credit arrangements to support mobility as well as to which extent the learning outcomes approach is beneficial in that context.

2.4 Description of tasks and methodology

The study shall focus on vocational education and training.

2.4.1 Tasks

The study requires rigor as far as terminology and working definitions for unitisation, modularisation and credit arrangements are concerned (see introduction 2.1). This shall be done in close cooperation with Cedefop's project manager responsible for the project.

Tasks 1, 2 and 3 below will be carried out on the basis of a sample of 15 European Member States. The sample of countries needs to be representative with regard to the coverage of the European Union (including older and newer Member States). It shall especially cover different VET regimes (dual system, school-based, combinations) and governance modi (centralised, decentralised/regionalised) as well as the level of development of unit-based approach to qualifications and validation mechanisms. Point 4 focuses on **8 comparative case studies** elaborated by taking best practice examples from the **15 European Member States surveyed**.

The contractor should carry out the following tasks:

Task 1: Produce an overview on the state-of-the-art of unitisation of qualifications and modularisation of programmes in VET. This includes a typology of unitisation and modularisation models, and the relationships or analogies between both. This task implies elaborating clear-cut definitions of unitisation and modularisation considering their links to qualifications and qualification awarding procedures, curricula and training programmes, learning outcomes approach, as well as recognition and validation mechanisms. This task includes reviewing scientific publications and research activities from the last 10 years.

Task 2: Analyse the institutional, legal and regulatory aspects of unitisation and modularisation against the objective of establishing flexibility and mobility in VET. This includes an analysis of strengths and weaknesses of different models of unitisation and modularisation as well as of the governance patterns and the legal frameworks for unitisation and modularisation;

Task 3: Research and analyse the relationships between unitisation and modularisation on the one hand and credit arrangements on the other, taking into account the different components of credit arrangements “à la ECVET” (design of qualifications, design of programmes, design of assessment and validation, certification and recognition mechanisms);

Task 4: Elaborate **8 comparative case studies** to identify and analyse arrangements and practices in-depth. These explanatory case studies will relate to a selection of **8 different qualifications**, some case studies will be linked to the issue of European learners’ mobility and crediting, others shall be linked to the issue of lifelong learning and validation; the case studies shall include 2 to 3 countries. They will touch upon the issues of unitisation and modularisation, credit arrangements and the role of learning outcomes, they will be developed from a sector/discipline/occupation perspective and will include: legal and regulatory context, the role of different stakeholders and competent bodies, the writing of learning outcomes, the definition of units/modules, the arrangements for mobility and the arrangements for assessment, recognition and validation. They shall pay attention to quality assurance mechanisms;

Task 5: Elaborate proposals to take forward in policy and practice the interrelations between unitisation of qualifications, modularisation of programmes and crediting and recognition of learning outcomes gained in different formal, informal and non-formal settings, for mobility and lifelong learning.

2.4.2 Methodology

The study should follow an explorative and multi-disciplinary, comparative approach. It should take into account existing research as well as develop primary data collection. Analysis of recent policy decisions (and reports), international and national literature as well as research reports should be carried out. The issues to be analysed imply a thorough qualitative analysis of legal, regulatory and institutional frameworks for unitisation and modularisation as well as credit arrangements (i.e. interviews with experts and stakeholders, and any other adapted means).

The study shall take into consideration the European centralised ECVET pilot projects¹⁶ and EQF projects as well as the research work undertaken by Cedefop on qualifications, learning outcomes, qualifications framework and credit systems¹⁷. Experts from the countries should be contacted to gather most up-to-date developments.

The overview on countries’ development implies carrying out literature analysis and developing adequate empirical instruments allowing for quantitative and qualitative approaches. The overview will include **15 Member States of the EU** selected upon their representativeness of VET in Europe.

In the different development stages, the contractor will be working in close collaboration with Cedefop’s project manager responsible for this project.

¹⁶ Available on-line at: <http://www.ecvet-projects.eu/>

¹⁷ Available on-line at: <http://www.cedefop.europa.eu/EN/understanding-qualifications/index.aspx>

2.5 Deliverables and timetable

The Contractor is required to submit:

An **inception report, 6 weeks after the date of signature of the contract**, which refines the methodology proposed in the tender, including indication of the countries to be analysed, a proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data, a detailed list of key stakeholders and institutions to be contacted, etc.) as well as an updated work plan and timetable.

An **interim report, within 8 months of the date of signature of the contract**, which will comprise:

A complete overview of developments in the 15 examined countries with intermediary findings;

A detailed presentation of the case studies that have been selected for in-depth analysis; highlighting intermediary findings;

A short description of the methodology, including the final version of the tools for data collection and analysis;

A complete list of data sources, including bibliographical data, reference people and institutions;

Information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study;

A proposed outline of the final report.

A **draft final report, within 14 months of the date of signature of the contract**, and a final report within 16 months of the date of signature, following the guidelines provided in these Technical Specifications and including:

An executive summary, highlighting the main findings and flagging up some key policy considerations for the future, which can also be distributed as a self-standing document;

A comparative analysis (15 countries) of approaches, identifying trends and actions, gaps and challenges across the countries under consideration, illustrated with selected examples that should be embedded in the text;

An in-depth analysis of case studies in a range of sectors selected;

Recommendations and lessons learned for the different stakeholders concerned with VET policy, researchers and practitioners at national and European level; and Annexes, such as a bibliography, list of abbreviations, research tools, and a full description of the methodology.

The contractor shall submit all deliverables in English, in hard copy and in electronic format. Figures and tables should be delivered separately in Excel or in Word, as appropriate. Excel charts should include the data used to be able to reproduce the charts. The electronic files must correspond fully to the hard-copy version. Lay-out and format of the text –in particular for citation, bibliography, tables and figures – have to comply with Cedefop's style manual (Annex H).

The selected Contractor shall ensure that the final reports as submitted to Cedefop have been subject to professional proof-reading and editing in English, the cost for which should be included in the Financial Proposal (the Table in point 5.4, item 2c).

2.6 Meetings and Travel Expenses

The contractor (**up to 2 persons**) will be requested to attend in total **three one day meetings with the responsible project manager at Cedefop's premises in Thessaloniki, Greece:**

1. A kick-off meeting 3 to 4 weeks after the contract is signed to fine-tune the research methodology to be applied, the data sources to be used and the final planning, described in the inception report;
2. A meeting to discuss the draft interim report and preliminary key messages of the study, monitor progress and agree on the outline of the final report;
3. A meeting to discuss and provide comments on the final outcomes and key policy messages included in the draft final report. The Contractor will take these comments into account in the preparation of the final version of the study (final report).

All costs incurred, including travel & accommodation related to Cedefop's meetings in Thessaloniki (described above) as well as any travel expenses that may occur in performing the tasks as described in point 2.3, have to be included in the Financial offer (see point 5.4, item 2a in Price Schedule table).

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in the Technical Specifications have also to be included in the Financial offer (see point 5.4, item 2b in Price Schedule table).

Any extra travel expenses, besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see point 2.6 – last paragraph and Annex III of the Draft Contract in Annex B).

3. Specific information concerning participation to this tender

3.1 Exclusion criteria

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

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

In case of recommendation for contract award point l) of Annex C will apply.

3.2 Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at his disposal. This obligation may be fulfilled by presenting statements from those entities or the consortium agreement.

3.2.1 Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer for the last three financial years for which accounts have been closed **concerning the type of services covered in this call for tenders** should be at least **130,000 €**.

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

- signed statement(s) of the tenderer's turnover concerning the type of services covered in this call for tenders during each of the last three financial years to prove that the tenderer's average turnover over that period meets the minimum required, which will be verified with the information provided in Annex G – Questionnaire 2;
- for consortium members or subcontractors who are natural persons/freelancers - a tax declaration and tax clearance statement for the last three financial years is sufficient.

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

In the case of contract award the winning tenderer will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation.

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

3.2.2 Technical and professional capacity

Requirements for Technical and professional capacity:

Tenderers must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the technical specifications. In particular, the tenderer must comply with the following requirements:

- **The tenderer must have at least three (3) years experience** in the fields of **a)** European education policy analysis **and b)** research on qualifications/VET systems in Europe, and have the capacity to access data at national and European levels;
- The tenderer must demonstrate capacity to analyse official documents linked to education and training in the languages of the countries included in the survey, corresponding to level B2¹⁸ of the Common European Framework of Reference for languages (CEF).

For the research team:

The proposed Team Leader must possess **all** the following requirements:

- **Minimum five (5) years** individual professional experience in managing research projects at European level;
- **Minimum five (5) years** individual professional experience in European comparative qualifications research **or** European Vocational Education and Training systems research;
- Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

For **each** researcher involved in the study:

- **Minimum three (3) years** individual professional experience in the field of European education policy analysis **or** qualifications/VET systems research in Europe;
- Each member of the proposed research team must possess the linguistic ability to communicate and draft in English, and as a whole the team must demonstrate capability to communicate and draft to a high standard in English corresponding to level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”.

¹⁸ <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

Proofs / Evidences of Technical and professional capacity

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

For the tenderer:

- Brief tenderer's profile that should also provide information as to experience relevant to the required fields of experience with a description of measures employed by the tenderer to ensure access to the required data;
- List of at least 3 contracts performed in the past three (3) years similar to the scope, size and nature of those required in this call for tenders, describing the subjects, the amounts, the dates, the percentage performed by the tenderer, and the contracting authorities (Annex G – Questionnaire 3);
- Description/Declaration of the tenderer's capacity to analyse official documents linked to education and training in the languages of the countries included in the survey, corresponding to level B2 of the Common European Framework of Reference for languages (CEF), including short profiles of the persons concerned.

For the research team:

- The detailed CVs of all members of the research team involved in the implementation of the contract (Team Leader and Researchers) with a brief description of professional experience, in particular in relation to the above required criteria including reference to linguistic abilities. Cedefop encourages the use of Europass CVs¹⁹ but other CVs will also be accepted.

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

3.3 Legal Position

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

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

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

¹⁹ <http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

4. Additional information concerning participation to this tender

Participation in tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 106 of the general Financial Regulation the participation is also open to all natural and legal persons in any non-EU country which has an agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

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

4.1 Joint Offers/ Groupings (Consortia)

Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.

Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.

If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.

A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.

Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).

Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.

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

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

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

4.2 Subcontracting/Subcontractors

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

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault.

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

The tenderer must clearly indicate:

- the identity of those subcontractors only undertaking between 10% and 40% of the work by value,
- the identity of each and every subcontractor if the total subcontracting is above 40% of the work by value, independently of his contribution to the work by value.

For each subcontractor, identified as per any of the above two bullet-points, the tenderer should submit with the offer:

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

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

Where no subcontractor is given (meaning that possible individual subcontracting is below 10% by value), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

5. Award of the contract

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

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

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

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

Whereby:

TQV = Total Quality Value of the tender, obtained as per point 5.1;

TFO = Total Financial Offer of the tender (as per point 5.4);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to (65);

Y is the weighting for price (TFO) and for this tender procedure it is fixed to (35).

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

5.1 Technical evaluation

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

The following Award Criteria will be applied to this tender procedure.

- ***Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (50 points)***
 - The level of understanding of issues related to unitisation and modularisation in education and training, incl. the learning outcomes approach (20 points)
 - The level of understanding of the impacts and challenges of VET policy, governance and legal frameworks in different Member States on the further development of geographical and professional mobility, and lifelong learning (10 points)
 - The level of understanding of issues of transfer and accumulation of learning outcomes, as well as the links between recognition, validation and credit arrangements (20 points).
- ***Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (30 points)***
 - Relevance and appropriateness of the methodology proposed, concerning e.g. data collection and analysis (incl. provision for terminology clearance), envisaged steps and data sources to be used to meet the requirements outlined in the Terms of Reference (20 points)
 - Rationale and proposed criteria for the selection of countries, qualifications and case studies (10 points).

➤ **Award criterion 3 – The organisation and management arrangements (20 points)**

- Allocation of tasks, type and degree of involvement of the proposed experts (10 points)
- Capacity to perform the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable), and assessment of likely difficulties in carrying out the work and proposed actions (10 points).

In order to guarantee a minimum threshold of quality, offers that do not reach a **minimum of 50% of the possible score for each award (evaluation) criterion** of the technical evaluation will be eliminated from further evaluation. Tenders scoring as a total **less than 65 (of a maximum of 100) points against the award (technical) criteria**, will not be considered acceptable and will therefore not have their financial proposal evaluated. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (see point 5.4 below).

5.2 Technical proposal

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria.

The evaluation of the technical quality will be based on the ability of the tenderer to meet the aim of the contract as described in the technical specifications. For this purpose, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

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

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide:

For award criterion 1

- A concise discussion demonstrating in-depth knowledge and understanding of the conceptual issues regarding unitisation and modularisation in European (vocational) education and training, incl. the learning outcomes approach. This discussion shall include a tentative working definition of unitisation and modularisation for the scope of the study, dealing among other things with the issues of standards and flexibility for validation of individual learning experiences (maximum 10 pages);
- A concise discussion demonstrating in-depth understanding of the impacts and challenges of VET policy, governance and legal frameworks in different Member States on the further development of geographical and professional mobility, and lifelong learning (maximum 5 pages);
- A concise discussion demonstrating in-depth knowledge and understanding of transfer and accumulation of learning outcomes, as well as their links to recognition, validation and credit arrangements (maximum 10 pages);

For award criterion 2

- A detailed description of the approach to be followed to carry out the overview in terms of terminology, methodology for data collection and analysis, envisaged steps and data sources to be used to meet the requirements outlined in the technical specifications (maximum 10 pages);
- An explanation for establishing the list of countries that will be considered in the study with regard to coverage of EU member states as well as the rationales for selecting case studies and the related qualifications;

For award criterion 3

- A description of the work organisation and management, i.e. the team to be assigned to the project and the distribution of tasks among them;
- A detailed timetable with descriptions of the deliverables, and different stages of work, including an analysis of the difficulties likely to be encountered in carrying out the work and an indication of how the tenderer intends to address these difficulties.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

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

5.3 Financial evaluation

Only tenders scoring **65** points or more (of a maximum of 100 points) against the technical award criteria and **50%** or more of the possible maximum score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered in the Price schedule table (see point 5.4).

5.4 Financial proposal

The financial offer must be clear and in compliance with the tender specifications. The Financial Proposal should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderers must fill in the following Price schedule table and present a detailed breakdown of the price offered.

The Financial Proposal should clearly match the Terms of Reference and the estimate of value (see point 1.5). All services that shall be procured should be included.

Price schedule table

1)	Names / positions of the Experts	Number of person-days	Unit price (EUR) per person-day	Price (in EUR) for services/ experts
	1a)			
	1b)			
	1c)			
	1 N)			
Subtotal 1 (1a+1b+.....)				
2)	2a) Attending 3 one-day meetings at Cedefop in Thessaloniki (point 2.6)	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
				.
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks (point 2.6)	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommod. etc
	2c) Other administrative expenses including professional proof-reading and editing in English of final report (point 2.5 – last paragraph)	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+ 2b+2c)				
3)	Total Price = Subtotal 1 + Subtotal 2			

*) **Distinguish between:** Expert/senior researcher - Junior researcher - Secretary/assistant - External expert (if applicable). The estimated total number of working days must be justified by the methodology and work organisation.

Information concerning price

- The prices quoted must be fixed and are not revisable.
- Prices must be quoted in euro and include all expenses.
- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior written approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract in Annex B).
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, 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 (this applies only to tenderers established in Greece): ... EUR.

6. Information on presentation and content of tender

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

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

6.1 Envelope A - Supporting documents

One original and one copy of:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award
- the exclusion criteria declaration requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in points 3.2, 4.1, 4.2
- Questionnaires 1 – 3 as found in Annex G
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J
- the Legal Entity Form as requested in point 3.3 and found in Annex D
- the Financial Identification Form as found in Annex E
- the checklist found in Annex F

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

6.2 Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal containing all information requested in point 5.4.

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

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

(Given as separate file in *.doc)

ANNEX D

LEGAL ENTITY FORM

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

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

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

ANNEX E

FINANCIAL IDENTIFICATION FORM

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

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

and completed and signed by an authorised representative of the tenderer (with indication of name and function), but not by subcontractors.

PLEASE NOTE:

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

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

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

Please Tick ✓ the boxes provided

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s) entitled to sign contract)	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Exclusion Criteria Declaration (including those of consortium members and subcontractors, if applicable)	3.1& Annex C	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1- 3 (Annex G)	3.2, 3.3, 4.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1 & Annex I (model 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2 & Annex J	☐	☐	
- Legal Entity Form	3.3 & Annex D	☐	☐	
- Financial Identification Form	6.1 & Annex E	☐	☐	
- this Checklist	6.1 & Annex F	☐	☐	
<u>Envelope 'B' must contain</u>				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	5.2	☐	☐	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4	☐	☐	

The tenderers should also ensure that:

☐	the offer is formulated in one of the official languages of the European Union.
☐	both the technical and financial proposals of the offer are signed by duly authorised agent.
☐	the offer is perfectly legible in order to rule out any ambiguity.
☐	the offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	the outer envelope bears the information mentioned in the invitation to tender point 3.

ANNEX G

QUESTIONNAIRES 1 – 3

(Given as separate files in *.doc)

ANNEX H

CEDEFOP STYLE MANUAL

(Given as separate file in *.pdf)

ANNEX I

POWER OF ATTORNEY - MODELS 1 & 2

(Given as separate files in *.doc)

ANNEX J

MODEL OF LETTER OF INTENT FOR SUBCONTRACTOR/S

(Given as separate file in *.doc)