



CEDEFOP

European Centre for the Development
of Vocational Training

Area Resources

Finance and Procurement, Procurement Service

Thessaloniki, 23/06/2011
RS/PRO/CALU/2011/0460

OPEN INVITATION TO TENDER

AO/RPA/MSERA-ALSTI/VET Statistical overview/009/11

‘Statistics and indicators to monitor VET and Lifelong Learning in European countries’

Ref.: Contract notice - 2011/S 117-192325 of 21/06/2011

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/RPA/MSERA-ALSTI/VET Statistical overview/009/11

‘Statistics and indicators to monitor VET and Lifelong Learning in European countries’

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)	22/08/2011	< N/A >
Last date on which clarifications are issued by Cedefop	as soon as possible	< N/A >
Deadline for submission of tenders (hand delivered)	31/08/2011	< 17.00h >
Deadline for submission of tenders by post / courier	31/08/2011	< N/A >
Validity of the tenders	02/03/2012	< N/A >
Tender opening session	14/09/2011	11.00h

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,

G. Paraskevaidis

Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

**AO/AREA/MSERA-ALSTI/
VET Statistical overview/009/11**

**‘Statistics and indicators to monitor
VET and Lifelong Learning in European countries’**

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.

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

(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*.

1 Overview of this tender

In submitting this 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: VET Statistical overview- Statistics and indicators to monitor VET and LLL in European countries
- b) The objectives of the contract are the following: a) contributing to the definition of a set of key statistics and indicators to monitor VET and Lifelong Learning in European countries, according to the policy objectives defined in the context of the Copenhagen process and in particular in the latest of Bruges Communiqué; b) developing, producing and updating new products and formats for data presentation/dissemination; c) contributing to the identification of limitations and gaps in the current European and international statistical infrastructure to support further developments and improvements.
- c) Type of contract: Service contract

1.2 Place of delivery or performance

The tasks must be completed at 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 terms of references.

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 170,000 Euro (without VAT).

1.6 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall have a duration of 40 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 references

2.1 Background information

Cedefop's work on [statistics and indicators](#) supports evidence based policy and practice in the fields of Vocational Education and Training (VET), Lifelong Learning (LLL) and Skill needs identification. Cedefop's statistics work contributes to:

- Statistical developments at European and international levels to improve availability, relevance and quality of data as well as methods and tools for data collection. In this area, Cedefop cooperates with key stakeholders (e.g. Eurostat, OECD, etc.) to develop and improve international statistics.
- Cedefop's regular activities and periodical publications aimed at [analysing policy](#) and [research developments](#) as well as [comparing European national vocational education and training systems](#).
- Dissemination and use of statistics and indicators on VET and lifelong learning, in tight link to the structure and the developments of the EU policy context.

Statistical information concerning VET and LLL originates from a wide range of sources and tends to be more fragmented than that related to general education. Therefore, Cedefop dedicates particular attention to data use and dissemination.

Statistical products and services include dedicated publications and regular updates of key statistics online. In particular:

- a) Dissemination of [key statistics on line](#), metadata (including methodologies) and policy documents on Cedefop's website. Data dissemination is structured by making use of two different approaches: a thematic approach and an 'input-process-output-outcome' approach.
- b) Production of the Statistics of the month, published on Cedefop's website, as short articles to inform about [latest trends](#) and patterns as emerging from the most updated data available.
- c) Production of [dedicated statistical publications](#), such as, for instance, [Key figures on Vocational Education and Training](#), [Evaluation of Eurostat education, training and skills sources](#), and [Employer-provided vocational training in Europe](#). Two additional publications, which will provide useful inputs for this project, are planned by September 2011 and February 2012. They will focus on labour market outcomes of VET (based on the 2009 EU-LFS ad hoc module on entry of young people into the labour market).

Cedefop's statistical work and outputs present:

- Strong link to the EU policy context
- Synthetic, concise and user friendly approach to data use and dissemination
- Attention to possible statistical developments to increase availability, quality and relevance of data

Cedefop disseminates clear, reliable, timely, and comparable information to its target groups, namely policy-makers, researchers and practitioners, through electronic and printed media.

In this context, this project aims at further developing Cedefop's work on Statistics and Indicators.

2.2 General and specific objectives

The project will contribute to the establishment of quantitative baselines and to the monitoring of national and European progresses in the field of VET and LLL in the context of the [Copenhagen process](#), in the light of the strategic approach and priorities adopted for the period 2011-2014 ([Bruges Communiqué](#)) and considering the aim of the [Europe 2020 strategy](#).

In addition, the project will contribute to identify and quantify key aspects of VET and LLL for benchmarking³ European countries.

This project thus aims at:

- Contributing to the definition of a set of statistical indicators to describe, monitor and benchmark European countries with respect to key aspects of VET and LLL, according to the policy objectives defined in the context of the Copenhagen process and in particular in the latest Bruges Communiqué.
- Contributing to further exploitation of available data by developing, producing and updating new statistical formats and products for concise data presentation and dissemination.
- Contributing to the identification of limitations and gaps in the current European and international statistical infrastructure to support further developments and improvements.

The project will consider information concerning VET and LLL in the wide context of the European and international statistical infrastructure. The European and international statistical infrastructure is defined, in this call for tenders, as the combination of data collections, surveys and related data production processes carried out at European and international level to provide statistical information on VET and/or LLL (i.e. either directly designed for VET/ LLL or containing some specific information on VET/LLL).

In this definition, the European and international statistical infrastructure primarily includes the relevant surveys and data collections carried out in the context of the [European Statistical System](#) (ESS). However, it also includes other relevant data collections, surveys, researches and studies that, even though outside the ESS, are carried out in an international and comparative perspective and which can be used to provide additional/complementary information regarding important dimensions not covered by the ESS. In particular, an important component of such infrastructure refers to data collection and surveys carried out in the context of OECD work on education and training.

In addition, other relevant data collections, surveys, research and studies can be considered (complementary) parts of such infrastructure. These may include, for instance, other relevant data collections and surveys carried out in various contexts, as well as reports and studies carried out/financed by relevant institutions (such as for instance EU Commission, its DG Education and Culture, Cedefop, or the OECD itself) or even by research institutes/universities. The degree of integration of those additional sources into the European and international statistical infrastructure, and consequently their use in this project, may depend on their specific characteristics (such as for instance quality, relevance, regularity, geographical coverage, etc), which will have to be assessed in the context of this project by the contractor.

The project will consider the European and international statistical infrastructure in its present status, as well as in its expected and desirable evolution, in order to identify the information that is currently available, the information that is expected to be available in the next future (e.g. following recent/ongoing developments) and the information that, even though not expected in the next future,

³ In this call for tenders the term benchmark is used in a very general sense to mean a reference against which things may be compared. References may be constituted for instance by EU averages, variability measures, other countries' performances, etc. The EU2020 strategic framework for Education and training has also established quantitative targets, commonly referred as benchmarks. In this call for tenders, the term benchmark may include (but it is much more general than) the term benchmark as used in the EU2020 strategic framework. This is because only in a few cases such policy targets can be directly applied to VET and to the aspects that will be considered in this study.

would be ideally required. In carrying out the work, the contractor shall consider possible developments at methodological and statistical level, which may have an impact on data availability and organisation, taking into account developments such as newly available data, new/improved indicators and consequent allocation of indicators to policy objectives and themes.

Point 2.6 provides additional information on the sources that could be used in the project.

The geographical focus of this project is on the 27 EU Member States, plus the candidate countries and the EFTA-EEA countries. In relation to each indicator considered, the best geographical coverage will have to be ensured. To the extent possible, comparisons with EU averages (or other reference values) will also have to be ensured.

The theoretical list of the countries to be covered is provided in Annex 1. However, the project will be carried out considering that, for some indicators, data will not be available for all countries and that overall data availability will be particularly limited for some of the non EU Member States. Depending on the different types of products/updates (as outlined in the description of work packages and related annexes), specific solutions for dealing with limited data availability will have to be defined.

Reference time of the indicators will be defined to account for their levels and trends. In the definition of the reference time, particular attention will be paid to 2010 as it represents the ending point of a policy cycle (Lisbon strategy, assessment of the Copenhagen process) and the starting point of a new policy one (Europe 2020, Bruges communiqué). Depending on the different types of products/updates (as outlined in the description of work packages and related annexes), specific reference time for levels and trends will have to be defined and agreed between Cedefop and the contractor. Additional specifications on reference time of the indicators are provided under point 2.3.2.

In the context of this study, the contractor shall define and organise a set of relevant indicators; define new formats and products for data presentation and dissemination (definition of contents, layouts, principles to be used in data presentation/dissemination); produce and update the reports. Within the scope outlined in this call for tenders, contractor's proposals included in the tender will be then fine-tuned and agreed between Cedefop and the contractor at inception and interim stages (also taking into account current and future data availability). Cedefop will also provide comments on all reports submitted. The contractor shall take Cedefop's comments into account.

2.2.1 Defining a set of indicators for VET and Lifelong Learning

The set of indicators to be produced in the context of this contract will address the main information needs and the key aspects that are deemed relevant for a statistical description/benchmarking of European countries with respect to VET and LLL.

Main information needs and key aspects will be defined based on relevant policy documents as well as on relevant research and statistical literature. The set of indicators will have to keep a tight link with EU policy objectives as defined in the Copenhagen process. In this context, the general and strategic objectives defined in the Bruges Communiqué will have to be considered. Particular attention will be devoted to aspects of VET and LLL such as attractiveness, quality, labour market relevance and outcomes, flexibility, permeability, inclusiveness, investments, internationalisation and mobility.

The set of indicators will distinguish between different degrees of centrality:

- Core indicators, i.e. a limited number of indicators deemed necessary to concisely describe and benchmark European countries with respect to VET and LLL.
- Complementary indicators, i.e. a limited number of indicators useful to describe and benchmark European countries with respect to VET and LLL in a deeper or wider sense.
- Context indicators, i.e. a limited number of demographic, social and economic indicators, important to understand the context in which VET and LLL systems operate.

The set of indicators will be defined by primarily relying on available data in the context of the current European and international statistical infrastructure as defined in points 2.2 and 2.6. This is to maximize and valorise its contribution to the aim of the exercise. However, the set of indicators will also consider expected and desirable data availability. In particular, the set of indicators will consider different degree/type of availability:

- Available indicators: indicators already available in the current European and international statistical infrastructure (as defined in points 2.2. and 2.6).
- Expected indicators: Indicators that: a) are not currently available (given the present status of the European and international statistical infrastructure), but b) are expected to be available in future (e.g. because of recent/ongoing developments⁴).
- Missing indicators: indicators, statistics, measurements, or data that: a) are not currently available; b) are not expected to be available in the next future; but c) would be necessary to ensure an appropriate description/benchmarking. Missing information may include indicators commonly available at national level (even though not at international level) and/or qualitative indicators based on characteristics/mechanisms featuring the various national VET and LLL systems.

The set of indicators will primarily consider quantitative indicators. To the extent possible, it will also consider qualitative indicators. The set of indicators will therefore distinguish between:

- Quantitative indicators
- Qualitative indicators

Qualitative indicators are defined, in the context of this tender, as indicators measured on a qualitative scale (i.e. dichotomous scale, nominal scale, ordinal scale). Qualitative indicators may turn out to be particularly useful to describe VET systems and LLL based on particular dimensions or taxonomies such as for instance presence or absence of particular characteristics or mechanisms.

⁴ Such developments may include for instance innovations in questionnaires, classifications and regulations within the European Statistical systems, completed or ongoing surveys and data collections, whose results have not been published yet, planned surveys and data collections etc.

In this call for tenders, qualitative indicators should not be confused with qualitative variables (also measured on a dichotomous, nominal or ordinal scale). For instance participation in lifelong learning will be considered in this call for tenders as a quantitative indicator. This is because it is associated with a numeric value (i.e. the percentage of people aged 25-64 participating in lifelong learning), even though the variable participation is measured on a nominal scale (i.e. participation vs non participation). On the contrary, for instance, the existence at country level of a set of mechanisms to identify skills needs in labour market (able to ensure full national/sectoral coverage) may be a qualitative indicator.

Qualitative indicators will only be considered in the initial phase of the project (definition of an ideal list of indicators) and will not be part of the shortlist of core and quantitative indicators that will be used in the following phases of the project (new formats and products for data presentation and dissemination). In particular, assessment of countries' relative positions on qualitative indicator is not part of this call for tenders (see also below).

The set of indicators will be established so as to allow the identification of:

- An ideal list of indicators, i.e. a limited but more comprehensive set of indicators to be used as a framework for describing, monitoring and benchmarking countries with respect to VET and LLL. This set will consider available, expected and missing indicators, as well as core, complementary and contextual indicators. It will include quantitative and qualitative indicators.
- A shortlist of core quantitative and currently available/expected indicators, that will be adopted in the context of concise statistical publications/data dissemination activities.

The ideal set of indicators will be contrasted and compared to the data already available in the current European and international statistical infrastructure. The comparison will allow identifying limitations and gaps in available data (and supporting further developments/improvements). The comparison will also help defining a shortlist of core and currently available indicators which will be used as a basis for producing and updating concise statistical reports and publications.

The set of indicators (ideal list and short list) will be complemented with additional information, concerning the characteristics of each indicator, such as for instance: the key aspect/policy objective to which they refer with reference to relevant European policy processes (see above), their degree of centrality, their degree of availability, the (possible) source and, where applicable, their regularity⁵, periodicity, quality and relevance, etc. A list of possible characteristics, that could be further improved, refined or complemented, based on contractor's offer, is provided in Annex 3.

The set of indicators (ideal list and short list) will be appropriately organised and presented. The criteria to organize and present the lists shall consider at least policy objectives; main information needs and key aspects to be monitored, degrees of centrality of the indicators, availability and type/degree of availability of the indicators and possibly quality and relevance of the indicators.

In the definition of the set of indicators, the contractor shall consider and evaluate the possibility to include at least the aspects and the statistical information suggested in Annex 2.

2.2.2 Identification of limitations and gaps in the current European and international statistical infrastructure

After having defined the statistical information that would be ideally required for the purpose of the exercise, it will be possible to assess the adequacy of the European and international statistical infrastructure (as defined in point 2.2) to provide such information. In particular, limitations and gaps will be spotted. Recommendations to support further developments and improvements will be drawn.

⁵ Regularity is here meant as the dimension allowing for distinguishing information sources (surveys, data collection, research activities) that are periodically available from the ones that are only occasionally available. Periodicity is meant as the period of time occurring between two rounds of the same survey, data collection or research activity.

Gaps are understood as issues related to data availability and limitations are understood as issues related to data quality and relevance (e.g. regularity, periodicity, specificity, availability and consistency of time series, geographical coverage and availability of EU aggregates, etc.).

The adequacy assessment and the drawing of recommendations will have to consider the context and the constraints in which the European and international statistical infrastructure operates, including resources limitations, attention to respondents burden, utility maximisation of the current surveys and data collections, existence of regulations, etc.

2.2.3 New statistical formats and products for concise data presentation and dissemination.

Based on a shortlist of core and currently available indicators, the contractor shall develop, produce and update new concise formats and products for data dissemination and presentation. As better specified in point 2.3.2 and related annexes, two different types of products/formats are expected: *VET Country overviews* and *VET indicators overview*.

VET country overviews and *VET indicators overview* will be periodically updated as specified in point 2.3.3 and 2.4, taking into consideration improved availability and conceptualization (e.g. availability of more recent/revised data, availability of new/improved indicators, availability of data for countries previously missing, etc). Appropriate technical arrangements will be provided to reduce the workload related to the updates.

The contractor shall perform the updates of the products as specified in points 2.3.3 and 2.4. After the end of the contract, Cedefop will take over the responsibility of the updates. Appropriate technical arrangements will be provided to facilitate Cedefop in doing so.

2.3 Description of the tasks

Overview of the tasks

Phase (PH)	Description of phase	Work package (WPs)
PHASE 1 (PH1): Statistics and indicators to monitor VET and LLL	PH1-Methodological work to define a set of statistics and indicators to describe, monitor and benchmark European countries with respect to VET and LLL.	WP 1: Methodological report
Phase 2 (PH2): new formats and products for data presentation and dissemination	PH2- Development and production of new formats and products for data presentation and dissemination	WP 2.1- <i>VET Country overviews</i>
		WP2.2- <i>VET indicators overview</i>
Phase 3 (PH3) Updates	PH3- Updates of products, taking into consideration more recent data, new indicators, etc.	WP 3.1-1 st Update of <i>VET country overviews</i>
		WP 3.2-2 nd Update of <i>VET country overviews</i>
		WP 3.3-1st Update of <i>VET indicators overview</i>

NB: Additional information on deliverables and indicative timetable is provided in paragraph 2.4.

2.3.1 Phase 1: Statistics and indicators to monitor VET and LLL

The overall objective of Phase 1 is to define a set of statistics and indicators to describe, monitor and benchmark European countries with respect to VET and LLL, according to the policy objectives defined in the context of the Copenhagen process and in particular in the context of the Bruges Communiqué.

Only one work package is due in Phase 1: Work package 1-Statistics and indicators to monitor VET and LLL (Methodological report).

More specifically the objective of WP1 is to carry out methodological research to:

- define, organise and present an ideal list of statistics and indicators that would be required to describe, monitor and benchmark European countries with respect to VET and LLL;
- assess the adequacy of the European and international statistical infrastructure, as defined in paragraphs 2.2 and 2.6, to provide the required statistical information;
- define, organise and present a shortlist of core, quantitative and available indicators, suitable for adoption in concise statistical publications and reports.

To achieve those objectives, the contractor shall perform the following tasks:

- With reference to the policy agenda and relevant research and statistical literature, the contractor shall identify the main information needs and key aspects deemed to be relevant for a comparative statistical description/benchmarking of European countries with respect to VET and LLL. This task should be carried out in close consultation with Cedefop.
- Based on the main information needs and key aspects previously identified, the contractor shall define and organize an ideal list of indicators relevant for a comparative statistical description/benchmarking.

- Based on the information needs and key aspects previously identified and on the ideal list of indicators previously defined, the contractor shall assess the adequacy of the European statistical infrastructure to provide the relevant information.

The adequacy assessment will consider the ability of the present statistical infrastructure to cover the main information needs and key aspects to be monitored (availability of indicators). The adequacy assessment will point out which indicators are already available, which ones will be so in the next future and which ones are not available but are needed for the purpose of the exercise.

Besides availability, other dimension of adequacy may be addressed, such as quality and relevance of information available (e.g. regularity⁶, periodicity, specificity, availability and consistency of time series, geographical coverage, availability of EU aggregates, etc.).

- Based on quality and relevance, the contractor shall produce a short-list of about 20-25 core, quantitative and currently available indicators, to be used in concise statistical publications. To this end, the contractor shall consider the possibility of attributing scores to the available core indicators with respect to the dimensions of relevance and quality.
- In addition to a more detailed analysis, the contractor shall provide a concise summary of the outcomes of the adequacy assessment, presenting: the main information needs/key aspects to be covered, the ideally required statistics and indicators, the available statistics and indicators, the current limitations (availability, quality and relevance issues), the developments that would be required (including recommendations), the shortlist of core, quantitative and currently available indicators that will be used in next phases to produce concise statistical reports. This concise summary will be used to briefly present the outcome of phase 1 and will be used in some of the outputs of phase 2 (*VET indicators overview*).

The work package will be associated with the following deliverable:

A methodological report (Statistics and indicators to monitor VET and LLL) of about 60 pages (plus annexes) presenting information on:

- The main information needs and key aspects that are deemed to be relevant for a comparative statistical description/benchmarking of European countries with respect to VET and LLL.
- An ideal and organised set of indicators that would be required for such a comparative statistical description/benchmarking and its relation with the main information needs and key aspects to be covered.
- Statistics and indicators currently available that could be used for the above mentioned purpose and their relation with the main information needs and key aspects to be covered.
- Adequacy assessment of the currently available statistical information (including data gaps and quality/relevance issues as well as recommendation for improvement).
- An organised shortlist of about 20-25 core, quantitative and available indicators to be used in concise statistical reports and publications.

2.3.2 Phase 2: Development and production of new formats and products for data presentation and dissemination

The overall objective of Phase 2 is to develop and produce new concise formats and products for data dissemination and presentation. Products will be updated as outlined in phase 3.

The products will be based on a shortlist of core, quantitative and currently available indicators (previously identified in phase 1). The indicators will be organised by making use of criteria (previously defined) based on the policy objective/key theme to which they refer.

⁶ Please refer to footnote number 5.

Two different work packages are due in phase 2, each one of them related to a specific format/product for data presentation and dissemination:

Work package 2.1-VET country overviews

VET country overviews will be defined as a set of statistical reports, each one of them related to a specific country (country overview). Each country overview will bring together data for a specific country (and, to the extent possible⁷, for all the shortlisted indicators).

Work package 2.2 - VET indicators overview

The VET indicators overview will be defined as a set of statistical reports, each one of them related to a specific indicator (indicator overview). Each indicator overview will bring together data for a specific indicator (among the shortlisted ones) and, to the extent possible, for all countries to be covered.

Statistical reports (country overviews and indicator overviews) will present data, flags, notes, footnotes and short comments related to data. They will do so in approximately 2-3 printable A4 pages. Data will be presented by means of tables and appropriate charts.

Short comments will provide key information points to help describing and reading the data (see also Annex 6, point 7).

The contractor shall provide the statistical reports (country overviews and indicator overviews) as stand alone products that will be published on line or on paper by Cedefop. In addition, the contractor will bring together the indicator overviews to produce a master report (*VET indicators overview*), which will be complemented by the contractor with an introduction to present the context in which the work has been carried out and its objectives. The introduction will include a concise summary of the methodological work previously performed.

The contractor shall propose at least one possible layout for the country overviews and at least one possible layout for indicator overviews. To the extent possible the layout scheme will be replicated and applied consistently across the various reports of the same type. The proposals, based on the contractor's offer, will be fine-tuned and agreed between Cedefop and the contractor.

Statistical reports (country overviews and indicator overviews) will present level and trends of the short-listed indicators. They will contextualize country data by comparisons with EU reference values which will work as benchmark values for benchmarking/describing the performances of the countries considered.

In addition to original values (i.e. as retrieved from the relevant source), country overviews will present standardized data (i.e. appropriate transformation of the data by making use of standardization techniques). This will allow visualizing and comparing the relative performance of countries with respect to EU reference values across different indicators (controlling for the different units of measure).

The contractor shall consider that data quality issues will be found and will have to be managed (such as for instance breaks in series, unavailability of figures for EU aggregates, unreliability/unavailability of particular values for particular countries). The contractor shall therefore identify the most appropriate measures to deal with such issues in selecting, presenting, analysing and commenting the data.

⁷ For some of the most relevant indicators data are not available for all countries.

In the selection of the time frame for levels and trends of the indicators, the contractor shall consider that:

- particular attention will have to be paid to 2010 as it represents the ending point of a policy cycle and the starting point of a new policy cycle (see 2.2.);
- Cedefop wants to use 2010 data as a contribution for setting a quantitative baseline to help monitoring the Copenhagen process in the period 2010-2020.

Ideally, the selected timeframe will allow reporting levels of the indicators in 2000 and 2010, as well as time trends following 2010 (considering at least the most recent year available following 2010).

However, the contractor shall consider that relevant indicators present different degrees of timeliness (length of time between data availability and the event/phenomenon they describe) and different degrees of consistency over time (presence of breaks in series).

Therefore, compared to the ideal timeframe, shorter or different reference times will be considered in case of availability/reliability issues affecting the time series (e.g. breaks in series, unavailability of data for some years).

The privileged solution to manage this issue will be the adoption of a mixed timeframe, depending on the specific type of product/update under consideration and depending on the specific indicator under consideration. Exact definition of the timeframe for each specific release of the statistical reports and for each specific indicator will be agreed between Cedefop and the contractor. This will determine the selection of the reference years to be used in summary tables, charts and comments.

For instance, the following design could be agreed. In the first releases of the statistical reports, data could ideally refer to the period 2000-2010 (where possible, data could additionally consider the most recent year available following 2010). Further updates could consider a different timeframe, with time trends ideally related to the period 2010-most recent year available (following 2010). In such updates, values for year 2000 could also be ideally considered (or at least reported), so as to provide richer information concerning time trends).

In addition, for indicators whose 2010 values are not yet available, the closest year available (closest to 2010) could be considered and for those indicators where values for 2000 are not available/comparable, appropriate/different years could be considered.

Additional specifications concerning Phase 2 can be found in the following annexes:

- Annex 4 provides further specifications on principles to be used in data presentation for Country overviews, including an example of possible layout for Country overviews;
- Annex 5 provides further specifications on principles to be used in data presentation for the *VET indicators overview*, including possible layout;
- Annex 6 provides further specifications concerning selected issues that will have to be addressed in order to produce and update both Country overviews and Indicator overviews.

With regard to Annexes 4 and 5, examples are provided only to illustrate the meaning of the approach to be adopted in data presentation and possible items that could be presented. Examples should be considered in the light of the specifications provided in point 2.3.2 and of the further specifications in Annexes 4 and 5. Examples could be further improved, refined or complemented.

Work package 2.1 will be associated with the following deliverables: *VET country overviews*

Work package 2.2 will be associated with the following deliverables: *VET indicators overview*

2.3.3 Phase 3: updates

The overall objective of phase 3 is to periodically update the *VET country overviews* and *VET indicators overview*.

Phase 3 will be structured in 3 working packages:

- Work package 3.1 will aim at producing the 1st update of the *VET country overviews*.
- Work package 3.2 will aim at producing a 2nd update of the *VET country overviews*.
- Work package 3.3. will aim at producing the 1st and only update of the *VET indicators overview*

Updates will consider content and organisational issues (such as availability of more recent/revised data, availability of new/improved indicators, availability of data for countries previously missing, etc).

Contractor's proposals included in the tender regarding content of the updates, will be then fine-tuned and agreed between Cedefop and the contractor at inception and interim stages.

The contractor shall carry out the number of updates as outlined in this call for tenders. After the end of the contract Cedefop will take over the responsibility of the updates. The contractor shall adopt appropriate arrangements to reduce the workload related to the updates of tables and charts and to facilitate Cedefop in taking over the responsibility of updates not covered by this call for tenders (e.g. adopting user friendly solutions able to reduce updates workload, provision of documentation on the structure and the functioning of the solutions adopted, etc.).

2.4 Deliverables and timetables

Phase (PH)	Work package (WPs)	Deliverables	Indicative time table
PHASE 1 (PH1): Statistics and indicators to monitor VET and LLL	WP 1: Methodological report	Methodological report	May 2012
Phase 2 (PH2): new formats and products for data presentation and dissemination	WP 2.1 <i>VET country overviews</i>	Production of a set of concise statistical reports by country	October 2012
	WP 2.2 <i>VET indicators overview</i>	Production of a statistical publication based on concise statistical reports by indicator	November 2012
Phase 3 (PH3) Updates	WP 3.1-1 st update of <i>VET country overviews</i>	WP 3.1-1 st update of <i>VET country overviews</i>	October 2013
	WP 3.2-2 nd update of <i>VET country overviews</i>	WP 3.2-2 nd update of <i>VET country overviews</i>	October 2014
	WP 3.3-1st update of <i>VET indicators overview</i>	WP 3.3-1st update of <i>VET indicators overview</i>	November 2014

The contractor shall consider that the indicative timetable has been defined for the statistical reports to incorporate availability of fresh data as they are published by relevant sources.

In particular, relevant sources (mainly Eurostat website⁸) publish fresh data for the most relevant statistics and indicators in (by) June/July of each year. In the production/updates of the statistical reports, the contractor shall ensure appropriate working arrangements, so that statistical reports will be produced taking into consideration the freshest data. In particular, the contractor shall ensure that the autumn releases of *VET country overviews* and of *VET indicators overview* will be based on data resulting from the June/July updates of Eurostat on line database.

2.5 Reports

All reports shall be submitted to Cedefop in English. The contractor shall ensure that the reports intended for publication and as submitted to Cedefop have been subject to professional proof-reading and editing in English.

The reports will be submitted in publishable standard and to the extent possible complying with relevant Cedefop style guidelines (see annex H).

The contractor shall consider that Cedefop intends to publish and regularly update on its website *VET country overviews* and *indicator overviews* as stand alone products. In particular, Cedefop will publish on its website a set of pdf, xls and word files (one per indicator and one per country).

Indicator and country overviews will be submitted both in Microsoft Word and in Microsoft Excel with all tables, graphs, notes, footnotes and comments included at the appropriate place. Original statistical tables (retrieved data) used to obtain relevant output will be provided to allow for quality control.

The contractor will provide the excel files with the most appropriate arrangements to ensure that:

- The excel files have an appropriate format and layout for direct publication on Cedefop's website. In particular, the layout will have to be printable in approximately 2-3 A4 format pages and should be easily transferable to word files of the same type.
- The excel files can easily be translated in word and pdf files, so that formatting work can be minimized.
- The excel files will allow to perform quality control based on comparison between retrieved data and output data.
- The excel files will be easy to update.

In addition to the above deliverables, the following documents will be provided:

- Interim report: one interim report presenting short overview of work progress, content, format and structure of key products (March 2012).
- Interim notes: presenting a summary of planned updates (March 2013, March 2014) to be fine tuned and agreed with Cedefop.
- Update notes: short summary of work conducted for updates plus annexed key products and results (November 2013 and November 2014).

2.6 Sources and tools for the project

2.6.1 Sources

The contractor shall perform the work considering the use of the following sources:

EU policy documents with reference to education and training in general and VET in particular, such as, for instance:

⁸ See also point 2.6

- [Europe 2020](#), including the 2 flagship initiatives on “[Youth on the move](#)” and “[New skills for new jobs](#)”
- documents related to the [Strategic framework for European cooperation in education and training](#) (e.g. “[ET 2020](#)”, “[A New impetus for VET](#)”),
- documents related to the establishment and follow up of the [Copenhagen Process](#) for vocational education and training, with particular regard for the [Bruges Communiqué](#) (i.e. the general and strategic objectives, as well as the elements defining a global vision for VET, as outlined in the Communiqué)
- documents related to the development of indicators and benchmarks in the field of education and training (in general) and VET and LLL in particular, such as for instance the ones related to the establishment of a [coherent framework of indicators and benchmarks in education and training](#)⁹.

Other documentation related to ongoing works on policy and technical developments, particularly in the field of indicators and benchmarks (that may not be public), can be requested to Cedefop, which, to the extent possible, will make it available to the contractor and provide indications on its use.

Relevant institutional, research and statistical literature in the field of theory of indicators and its applications to education and training (particularly VET and LLL), with a focus on the latest developments concerning [quality indicators](#) and [lifelong learning conceptualization](#)):

a) CEDEFOP's work:

- in the field of Statistics and Indicators as described in paragraph 2.1 (Background information) and as emerging from the relevant references and hyperlinks provided there;
- [in the field of policy reporting](#);
- in the field of reporting on national VET systems ([VET in Europe database and Country reports](#));
- [in the field of employer-provided vocational training](#);
- In the field of labour market outcomes of VET (forthcoming study)¹⁰;
- [in the field of skills demand and supply forecast](#).

b) International data collection and surveys carried out in the context of the European Statistical System (ESS), providing information on Education and Training and VET/LLL, such as for instance the [UOE data collection on education systems](#), the [Continuing Vocational Training Survey](#) (CVTS), the [Adult Education Survey](#) (AES), the [EU-Labour Force Survey](#), and relevant ad-hoc modules, the [EU Labour Market Policy Database](#), [EU Labour Cost Survey](#), [EU Surveys on ICT usage in households and by individuals](#), the [ESSPROS-European System of Integrated Social Protection Statistics](#), etc).

c) Other relevant data collections, surveys, reports and researches, that, even though outside the ESS, are or have been carried out at international and European level in a comparative perspective, such as, for instance: OECD data collections, surveys, reports and comparative research (either directly related to VET/LLL or having some specific information on VET/LLL¹¹), relevant studies and reports produced/financed by European Institutions (such as for instance. the European Commission and its DG Education and Culture, Cedefop, etc), international institutions (OECD, Unesco, ILO, World Bank) or even by other research institutes/universities (either directly related to VET or having some specific information on VET). They will be used as a complement to the available data produced in the context

⁹ The coherent framework of indicators and benchmarks in education and training have been designed and based on the ET 2010 work programme. However, ET 2020 calls for additional work by the Commission, together with the Member States, to examine how it could be harmonised with the ET 2020.

¹⁰ Reports and other outputs will be provided to the contractor as they become available

¹¹ One reference publication for statistics and indicators annually produced by the OECD is *Education at a glance*. The OECD is also active in the fields of VET and related policy developments (http://www.oecd.org/document/57/0,3746,en_2649_37455_46948217_1_1_1_37455,00.html)

of the European Statistical System (ESS), in order to provide additional/complementary information regarding important dimensions not covered by the ESS. The information will be provided so as to ensure the highest possible number of country covered. To the extent possible, the information will be provided so as to ensure comparability across countries.

d) Forthcoming/expected data collection, surveys, researches and reports, carried out both outside and inside the ESS at international and European level in a comparative perspective such as for instance forthcoming/expected rounds of the [AES \(Adult Education Survey\)](#), [CVTS \(Continuing Vocational Training Survey\)](#), [PIAAC \(Programme for the International Assessment of Adult Competencies\)](#), [VET-LSA project](#), [Evalvet project](#), [Eurobarometer surveys](#), etc.

Sources other than those mentioned here can be proposed and will be used on the basis of their specific characteristics (such as quality, relevance, regularity, geographical coverage. etc).

2.6.2 Secondary sources and finding tools

To perform the tasks the contractor shall use the most appropriate secondary sources and finding tools.

The vast majority of the available data can be retrieved on line and free of charge.

The main and most frequent finding tool used by the contractor will be the Eurostat on line database. It can be used free of charge (<http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes>). It will provide standardized output files that will facilitate following phases of work.

If, in few particular and well motivated instances, the contractor intends to make use of some data not published on line, it may be possible to ask for a restricted and selected number of ad-hoc data extractions to Eurostat (free of charge) that will be managed in cooperation with Cedefop. Depending on needs, data may be requested as flat files data extractions¹² or cross tabulated figures. Conditional to Eurostat approval, and to the respect of Eurostat's reliability limits and publishing guidelines, data could be provided and used.

The OECD also publishes relevant data and information on line. The statistical apparatus used for [Education at a glance](#) is available free of charge. In addition, part of the OECD online statistical database ([OECD Stats. Extract](#)) can also be accessed free of charge. The use of the OECD on line statistical resources is expected to be very limited, considering that most of the data are also collected and published by Eurostat, whose data present a wider country coverage at European level and can be accessed free of charge.

OECD data and information might be used with regard to some specific characteristics of the VET systems. For instance, [OECD Reviews of Vocational Education and Training \(VET\)](#), and in particular, the OECD - Learning for Jobs and Skills Beyond School, may provide examples of qualitative information useful to describe particular aspects of the systems.

2.6.3 Informatics tools and arrangements for data management

Data management will be carried out by using Microsoft Excel.

The arrangements used at informatics level to produce the output (tables and charts) will have to be as flexible and automatic as possible, in order to limit the work related to updates.

¹² A flat file is constituted by a set of records where specific combinations of variables are weighted by frequency counts.

This will be particularly relevant for the production of the country overviews, where a particular data manipulation will be required to transform the retrieved data (indicator specific tables) in the output data (country specific tables).

Flexibility will ensure a limited amount of work as more recent data or new indicators become available. Different degrees of flexibility can be identified.

The contractor shall provide and document a system that will ensure a good degree of flexibility. In this way, when more recent data will be available for the selected indicators (and possibly when new indicators will be available) the workload to update the output will be reduced.

The system will have to be user-friendly and well documented with respect to its structure and functioning. In this way, when Cedefop will take over the responsibility of the updates, the transition will be smoother.

The system could be constituted by a simple application, based on Microsoft Excel and exploiting cells references, so that updates of the input data will automatically generate an update of the output. More complex solutions could be identified, such as for instance mechanisms based on VBA scripts or Excel Macros, which will be able to increase the degree of flexibility and/or allow additional features (e.g. facilitating the introduction of new indicators/countries, providing a user interface, etc)..

2.7 Scheduled meetings

The contractor will be requested to attend 4 (max. one-day) meetings at Cedefop with the team responsible for the project:

- A kick-off meeting a few weeks after signature of the contract to agree a more detailed work plan as well as discuss and fine-tune possible themes, methods and indicators, to be used based on the contractor's offer (indicative timing November 2011)
- A 1st interim meeting to discuss the first draft interim report, monitor progress and discuss contents, structure and layout of products (indicative timing March 2012)
- A 2nd interim meeting to monitor progress and discuss updates in terms of content, layout, etc (indicative timing March 2013)
- A final meeting to discuss the finalisation of the project: final products, transfer of methodology to Cedefop, etc.(indicative timing March 2014) .

2.8 Reimbursement of travel expenses

The tenderer should include in his Financial offer the expenses related to the above mentioned meetings/travels as well as any other administrative expenses (see the Price schedule table in point 5.4).

Any extra travel, accommodation etc expenses besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see draft contract attached 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 to contracts above the threshold provided for in Articles 134.2(a) and 158.1(a) of the Implementing Rules of the general Financial Regulation (currently 125 000 EUR).

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

Requirements:

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

- The average annual turnover of the tenderer (of a single company, or of a consortium as a whole, if any) for the last three financial years concerning services similar to those required in this call for tender should be at least 100,000 € .

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

- Signed Statement(s) of the tenderer's turnover (for a single tenderer, or statements for each consortium member, in case of a grouping/ consortium) for the last three financial years concerning services in the fields covered by the subject of this call for tender, which will be verified with the information provided in Annex G –Questionnaire 2.
- Profit and Loss Account or equivalent of the tenderer (covering all fields of activity) for each of the last three financial years, which will be verified with the information provided in Annex G – Questionnaire 2.

In 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.

- for tenderers or consortium members who are natural persons / freelancers - a tax declaration and tax clearance statement for the last three financial years.

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 terms of references. In particular, they must comply with the following requirements:

- Three (3) years of tenderer's experience in management of research projects carried out during the last five years and concerning services similar to those required in this call for tenders.
- The tenderer's team of experts who will be proposed to implement the contract, must have the relevant knowledge and experience for its successful implementation. In particular, the team must comply with the following requirements:
 - The research team leader must have a total of five (5) years of professional experience in European or international research project management related to tasks as those described in these tender specifications, such as identifying information needs and selecting core indicators, evaluating quality and relevance of indicators, conducting and presenting comparative statistical analysis in the field of (vocational) education and training, lifelong learning or related fields, identifying critical data issues as well as effective measures to minimize their impact in data presentation/dissemination.
 - Each researcher involved in the study must have a total of three (3) years of professional experience in European or International projects related to tasks as those described in these tender specifications, such as identifying information needs and selecting core indicators, evaluating quality and relevance of indicators, conducting and presenting comparative statistical analysis in the field of (vocational) education and training, lifelong learning or related fields, identifying critical data issues as well as effective measures to minimize their impact in data presentation/dissemination.
 - All members of the proposed team must have a total of three (3) years of professional experience in managing data and metadata from secondary data sources (retrieving, storing, organizing, manipulating, processing and presenting by means of charts, tables, notes and footnotes).
 - Members of the proposed team in charge of textual drafting and/or in charge of managing relations with Cedefop must possess the linguistic ability to communicate and draft to a standard at least equivalent to level C1 in English. The rest of the team members must have knowledge of English at least equivalent to level B2.

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:

- brief company/institution profile proving experience relevant to the services required in this call for tenders and including an indication of the person in charge of the project management as well as a short description of the licensed software to be used for on line data retrieving (e.g. Internet browsers) and for data manipulation and presentation (see Annex G – Questionnaire 3);
- a list of at least three major contracts, studies, projects, research and data sources exploitation performed in the last five years similar to the scope, size and nature as those foreseen in this invitation to tender including subjects, services, dates, commissioning authorities, and budget (Annex G – Questionnaire 4);
- for all member(s) of the study team, detailed CV(s), preferably in [Europass format](#), underlining relevant professional experience, educational qualifications and English language competence, and including a list (with a brief description) of relevant output/publications.

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

3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. 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 (tables) 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).

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 Final Score (TFS) out of 100.

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

$$\text{Total Final Score (TFS)} = 70 * (\text{TQV} / 100) + 30 * (\text{Cheapest TFO} / \text{TFO})$$

Whereby:

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

TFO = Total Financial Offer of the tender (as per point 5.3);

70 is the weighting for quality score (TQV);

30 is the weighting for price (TFO)

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 65/100 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 Terms of references.

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

Award criterion 1 – Demonstration of an in-depth understanding of the overall objective of the work to be conducted as well as its policy and general contexts (20 points);

Award criterion 2 – Quality and relevance of the proposed approach in relation to the specific objectives of the work (50):

2a- quality and relevance of key themes, statistical information, possible indicators, methods and techniques suggested for analysis and data presentation (20 points),

2b - adequacy of the sources to complement the methodological approach followed e.g. literature, policy documents, data sources, on line databases, etc. (10 points);

2c- adequacy and clarity of the tools (and related documentation) proposed for the excel system, in terms of flexibility and user-friendliness, for future updates (20 points)

Award criterion 3 - Appropriateness of organization and management of the work (30):

3a- Project organisation, allocation of human resources to different tasks, type and degree of involvement of the proposed experts (15 points)

3b: Mechanisms to guarantee successful and on-time delivery of tasks with relevant quality and risk assessment (15 points).

Tenders scoring less than 65 (of a maximum of 100) points against the 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 (5.4).

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 tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of reference in point 2 above providing a practical and detailed description of the goods or services proposed for performance of the contract. The tenderer should include in the Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full to) all requirements outlined in the Terms of reference.

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 discussion of the subject demonstrating in-depth understanding of the concepts, policy, research and methodological issues.

For award criterion 2:

- 2a- A detailed description of the envisaged approach and methods, including key themes proposed to organise/group the indicators, statistical information, possible indicators, methods and techniques suggested for analysis and data presentation (including possible examples).
- 2b- A description of the sources to be used e.g. literature, documents, reports, surveys, data collections, online databases, possible measures to access data not published on line, etc.
- 2c- a clear description of the excel system to be used for hosting, manipulating and presenting relevant data, including a flowchart representing the structure and functioning of the mechanism and clear indications concerning at least: a) how the contractor intends to facilitate the update of the output when new/more data becomes available; b) how the contractor intends to facilitate the take over of the updates by Cedefop.

For award criterion 3:

- A detailed work plan illustrating the proposed organisation and management of the tasks including explanations of the role and extent of team member participation in the study, timetable with descriptions of the deliverables and any related milestones (please refer to points 2.4 and 2.5);
- A preliminary risk assessment of likely difficulties in carrying out the work and proposed actions/measures.

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 subcontracting 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 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).

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

Financial score = (Cheapest TFO / Financial Proposal of the tender considered) 30.*

30 = price weighting (see the complete award formula under point 5 above).

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.

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 4 meetings at Cedefop	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
				.
	2b) Other administrative expenses including professional proof-reading and editing in English of final report			Amount (EUR) for other administrative expenses
	2c) Other expenses (if applicable)	Number of persons	Price (EUR) per person	Amount (EUR) for other expenses
Subtotal 2 (2a+ 2b+2c)				
3)	Total Price = Subtotal 1 + Subtotal 2			

The VAT amount must be indicated separately here (this applies to tenderers established in Greece only): ... EUR.

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

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

Information concerning price

- The prices quoted must be fixed and not revisable
- Prices must be quoted in EURO and include all expenses
- Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges shall therefore not be included in the calculation of the price quoted.

6 Information on presentation and content of tender

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

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

6.1 Envelope A - Supporting documents

One original and one copy of:

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

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

6.2 Envelope B – Technical proposal

One original signed 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.

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PLEASE NOTE:

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

ANNEX F
CHECK LIST OF MANDATORY DOCUMENTS

(Given as separate file in *.doc)

ANNEX G - Questionnaire 1-4

(Given as separate file in *.doc)

ANNEX H

Cedefop Style Manual

(Given as separate file in *.pdf)

ANNEX I

MODEL 1 - POWER OF ATTORNEY

MODEL 2 - POWER OF ATTORNEY

(Given as separate file in *.doc)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as separate file in *.doc)

ANNEX 1 - GEOGRAPHICAL COVERAGE

Theoretical list of countries to be covered

Protocol order	Country code	Country
1	EU27	Europe 27
2	BE	Belgium
3	BG	Bulgaria
4	CZ	Czech Republic
5	DK	Denmark
6	DE	Germany
7	EE	Estonia
8	IE	Ireland
9	GR	Greece
10	ES	Spain
11	FR	France
12	IT	Italy
13	CY	Cyprus
14	LV	Latvia
15	LT	Lithuania
16	LU	Luxembourg
17	HU	Hungary
18	MT	Malta
19	NL	Netherlands
20	AT	Austria
21	PL	Poland
22	PT	Portugal
23	RO	Romania
24	SI	Slovenia
25	SK	Slovakia
26	FI	Finland
27	SE	Sweden
28	UK	United Kingdom
30	IS	Iceland
31	LI	Lichenstein
32	NO	Norway
33	CH	Switzerland
34	ME	Montenegro
35	HR	Croatia
36	MK	The Former Yugoslav Republic of Macedonia
37	TR	Turkey

The project will be carried out considering that for some indicators data will not be available for all the countries mentioned in the tables above, and that overall data availability will be particularly limited for some of the non EU Member States.

ANNEX 2 - POSSIBLE ASPECTS AND STATISTICAL INFORMATION TO BE CONSIDERED

To maintain a close link with European VET policy and the Copenhagen process, when defining a set of indicators, the contractor shall relate them to those key aspects of VET and lifelong learning (LLL) outlined in the Bruges communiqué.

The contractor will consider the possibility of relating the following statistical information to the key aspects shown.

Attractiveness of VET and LLL

- As measured for instance by participation patterns in VET (e.g. participation in initial upper secondary VET, participation in and provision of continuing vocational training in enterprises, participation in adult and lifelong learning)

Quality

- Quality indicators in VET¹³ (excluding indicators/information already included elsewhere in this annex)
- Aspects of quality such as satisfaction with respect to learning activities and use of skills and competences acquired as measured by the Adult Education Survey (COMMISSION REGULATION (EU) No 823/2010 of 17 September 2010), teacher to students ratio in initial VET, etc

Labour market relevance and outcomes

- Labour market relevance as measured for instance by participation in combined school and work based initial VET, incidence of apprenticeship in workforce, participation in non formal job related lifelong learning
- Labour market outcomes of VET and LLL, as measured for instance by employment/unemployment rates of VET graduates and related differentials compared to graduates from different levels/orientations of education¹⁴,
- General outcomes of VET and LLL in terms of: early leaving from education and training, educational attainment in the population (and/or in specific age groups), digital inclusion of the population (and/or of specific age groups), language knowledge in the population (and/or in specific age groups), employment and unemployment patterns by age and by educational attainment
- Other aspects related to specific outcomes of adult learning as measured by the Adult Education Survey (COMMISSION REGULATION (EU) No 823/2010 of 17 September 2010)

Flexibility of VET and LLL

- As measured for instance by incidence of adult learning during paid working hours, incidence of adult learning partly or fully financed by employers, enterprise provision of other type of CVT training (non CVT courses), participation in online courses, etc

¹³[Recommendation of the European Parliament and of the Council of 18 June 2009 on the establishment of a European quality assurance reference framework for vocational education and training](#)

¹⁴ The information is expected to be made available by OECD (Education at a glance 2011, based on a OECD specific data collection) and by Cedefop (A study on Labour market outcomes of VET, based on the 2009 EU-LFS Ad Hoc Module on entry of young people into the labour market).

Permeability as of VET and LLL systems

- As measured for instance by participation in (vocational) upper secondary programmes not granting access to higher education, participation in higher education and in LLL of initial VET graduates¹⁵.
- Other aspects of flexibility and permeability such as: the use of procedure of recognition of skills and competences (Adult Education Survey, COMMISSION REGULATION No 823/2010 of 17 September 2010)

Inclusiveness of VET and LLL

- As measured for instance by participation patterns in lifelong learning of selected target groups (e.g. older workers, low skilled people, unemployed, people with difficulties on the labour market, etc) and incidence of particular unprivileged target groups among initial VET graduates¹⁶
- Other aspects of inclusiveness such as completion rate¹⁷ and/or drop out rates in initial VET, incidence of particular unprivileged groups among initial VET graduates

Internationalisation and mobility related to VET and LLL

- As measured for instance by language learning in initial VET and mobility of learners

Investment patterns in VET and LLL

- As measured for instance by expenditure in education, and on educational institutions (where possible specified by level and orientation of education), individuals' expenditure in education and training, enterprises expenditure in education and training, government expenditure for training in the context of labour market policies for unprivileged target groups.

Additional key aspects and statistical information may be considered (for instance VET for self-employment and entrepreneurship, VET for technological innovation). Within each key aspect, additional (or different) statistical information may be considered to cover (or better capture) its particular dimensions under consideration. A different organisation of the indicators by key aspect may be considered.

The contractor shall also consider policy documents addressing the need for information concerning other issues that will be (or could be) specified for VET, such as

- Work on developing European benchmarks for learning mobility, education and training for employability, language knowledge¹⁸.

The contractor will also consider, particularly for the ideal list of indicators and for the [VET indicators overview](#), the possibility to include key information from Cedefop skills demand and supply forecast.

¹⁵ In addition to enrolment patterns as resulting from the UOE data collection, relevant LFS based information is expected to be made available by Cedefop (A study on Labour market outcomes of VET, based on the 2009 EU-LFS Ad Hoc Module on entry of young people into the labour market).

¹⁶ As for incidence of unprivileged target groups among initial VET graduates, some information is expected to be made available by Cedefop (A study on Labour market outcomes of VET, based on the 2009 EU-LFS Ad Hoc Module on entry of young people into the labour market), conditional to a prior quality assessment.

¹⁷ The information is expected to be made available by OECD (Education at a glance 2011, based on a OECD specific data collection).

¹⁸ http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf

The contractor shall also consider possible additional and contextual information such as:

- Demographic trends of growth and ageing of population, as measured for instance by growth rate of the population, old-age dependency ratio, ageing of labour force (observed and/or projected)¹⁹.
- Social and economic performance indicators as measured for instance by GDP per capita, GDP growth, percentage of persons at-risk-of-poverty after social transfers

¹⁹ While Eurostat demographic projections provide information on ageing of population and of population in working age, Cedefop's skill supply forecast (based on Eurostat data) provides information on ageing of labour force (employed and unemployed persons).

ANNEX 3 - CHARACTERISTICS OF INDICATORS (INDICATIVE LIST)

In the provision of additional information on the indicators, the contractor shall consider and evaluate the possibility to include at least the following characteristics:

- Identification number of the indicator
- Name/label of the indicator
- Brief description of the indicator
- Brief explanation of the indicator
- (Possible) primary and secondary source
- Regularity and periodicity of the source
- Data needed for calculation (numerator, denominator, etc)
- Method of calculation
- Scale of measurement (quantitative, qualitative ordinal, qualitative nominal)
- Unit of measurement
- Time series availability and consistency (presence of breaks in series)
- Geographical coverage and availability of EU reference values
- Categorization by degree of centrality (core, complementary, contextual)
- Categorization by degree of availability (available, expected to be available, missing)
- Categorization of the indicator with respect to a possible classification of the indicators based on Cedefop's thematic approach, (Education and Training 2020 benchmarks, Initial vocational education and training, Continuing vocational training and adult learning, Employment and knowledge, Demographic-Social-Economic background)
- Categorization of the indicator with respect to a possible classification of the indicators based on Cedefop's 'input, process, output, outcome' approach (input, process, output, outcome, context indicators)
- Categorization of the indicator with respect to a possible classification of the indicators based on main information needs/key aspects for VET
- Critical data issues concerning quality and relevance of available indicators and proposed measures to be adopted in selection/presentation/dissemination of data
- Any other information deemed to be important.

This list could be further improved, refined or complemented, based on contractors' offer.

Contractor's proposals included in the tender will be then fine-tuned and agreed between Cedefop and the contractor at inception and interim stages (also taking into account current and future data availability).

ANNEX 4 - FURTHER SPECIFICATIONS FOR WORK PACKAGE 2.1. VET COUNTRY OVERVIEWS

In each country overview, country data will be contextualized and compared with appropriate EU reference values which will work as benchmark values for benchmarking/describing the performance of the country considered.

The examples below are provided only to illustrate an approach to data presentation and the items that could be presented. Examples should be considered in the light of the specifications provided in point 2.3.2. The contractor is invited to propose improvements/new suitable approaches.

Reference values

For each indicator, reference values will consider:

- At least one measure of central tendency, such as for instance the EU-27 aggregate (from now on, referred to as EU-27 weighted averages).
- More than one measure of variability, such as for instance minimum values, maximum values, average deviations from the selected measure of central tendency, etc.
- The number of EU countries on which the previous measures are based.

The contractor shall identify the most appropriate reference values. In doing so, the contractor shall consider the following issues:

- Provision of one measure of central tendency. The privileged reference value for the measure of central tendency will be the value related to the EU-27 aggregate.
- Provision of more than one measure of variability. Possible reference values for measures of variability could be: the minimum value in the EU-27, the maximum values in the EU-27, the order-2 average deviation from the EU-27 aggregate²⁰, deviations of +/-25% from the measure of central tendency, quartiles, etc.
- For some indicators, data will not be available for all the EU countries. As a consequence:
 - the value of the EU-27 aggregate will not be available²¹ and will have to be replaced by a different appropriate measure of central tendency;
 - the variability measures will have to be calculated on a restricted number of countries and/or with respect to the selected substitute of the central tendency measure;
 - the contractor shall therefore identify the most appropriate measures to deal with such issue²².

²⁰ The standard deviation is just one of the possible order 2 average deviations from a central value. In particular, the standard deviation is the order 2 average deviation from the arithmetic mean. If the contractor shall opt for using order 2 average deviations, the contractor shall consider that among all the possible order 2 average deviations, the standard deviation is considered the least appropriate in this context. Order 2 average deviations from the EU aggregate or from the EU median (when the EU aggregate is not available) would be preferable.

²¹ Most of data that will be used will come from Eurostat (see also paragraph 2.6 on sources and tools for the project). Eurostat publication policy inhibits the publication of EU-27 aggregates when a number of countries has not provided data and/or when countries with particular weight on the overall EU-27 totals have not provided data.

²² For instance, where data is not available for all EU countries, it could be possible to work on the available data points and: a) substitute the EU-27 aggregate value with an alternative measure of central tendency (e.g. the median based on available data points), b) calculate the minimum and maximum on available data points, c) calculate an order 2 average deviation from a different measure of central tendency, d) document it with appropriate notes and footnotes.

Standardization

Original country data and original EU reference value (i.e. EU value as retrieved or as properly replaced) will be processed and standardized by appropriate standardization techniques. The choice of the standardization techniques will determine which ones among the original country data and the original EU reference values will be processed for this purpose²³.

The contractor shall identify the most appropriate standardization techniques and will apply them consistently for the different indicators and for the different countries. In the choice and in the implementation of the standardization techniques, the contractor shall consider the data issue mentioned above²⁴.

Presentation

The standardized country data and the standardized reference values will be used to produce standardized charts. These charts will allow comparing the relative position of the considered country with respect to some EU reference values. Since the charts will be standardized, it will be possible to compare also the relative position of the country across the different indicators short-listed, controlling for the different units of measure.

In each country overview, levels and, to the extent possible, trends of the short-listed indicators will be presented.

Original data (country data and reference values) will be presented by means of tables that will consider levels and trends.

Standardized values will be presented by means of charts. Charts will consider level and possibly trends of the standardized values. If needed/possible, the standardized values will be presented also by means of tables.

Layout

The contractor shall propose at least one possible standard solution for the country overview layout. Contractor's proposals, based on the contractor's offer, will be then fine-tuned and agreed between Cedefop and the contractor.

Missing country data

In some instances country data may not be available for a particular indicator. The contractor shall identify and implement appropriate solutions for dealing with these situations (e.g. leaving the corresponding indicator with no value, using symbols, etc.). The contractor shall provide indications on countries that are not EU member states and that present a very limited overall data availability (with respect to the shortlisted indicators). In this way the contractor shall facilitate Cedefop in not publishing country overviews that have (almost) no data.

Final settings

With respect to the different tasks outlined in this annex, contractor's proposals included in the tender will be then fine-tuned and agreed between Cedefop and the contractor at inception and interim stages (also taking into account current and future data availability).

²³ There are different standardization techniques available. Some of them only rely on measures of central tendency (e.g. percentage index numbers, being 100 the selected measure of central tendency). Some other ones only rely on measures of variability (e.g. percentage rescaling in the variation range). Some other ones rely on a combination of the 2 mentioned approaches (e.g. deviation from mean in units of standard deviation).

²⁴ For instance, it could be possible to use standardization techniques that do not rely on measure of central tendency. Alternatively it could be possible to replace the EU-27 aggregate with other measure of central tendency (e.g. median) as calculated from the distribution of available country data points.

Example: A possible indicative example is provided here below.

VET COUNTRY OVERVIEWS - POSSIBLE EXAMPLE

EXAMPLE ILLUSTRATING THE MEANING OF THE APPROACH AND POSSIBLE ITEMS TO BE CONSIDERED (to be replicated for each country to be covered)

This example only considers 3 indicators. More indicators will have to be considered for any given country. This example only considers an ideal timeframe 2000-2010 (with appropriate adjustments for availability/consistency of time series). However, additional/different years following 2010 will be considered to monitor developments following 2010. For all the three indicators, EU27 aggregates are made available by Eurostat (even though in one case this is an estimation based on 24 countries). The value 'std' refers here to the average deviation from the EU27 value and not to the average deviation from the arithmetic mean of the EU countries.

COUNTRY: Netherlands

Other items to be considered: tables, charts, notes, footnotes, short descriptions and comments

EXAMPLE OF POSSIBLE TABLE PRESENTATION: Situation in The Netherlands

		COUNTRY VALUE	EU VALUE	EU STD	EU MIN	EU MAX	Num. EU countries
Students participation in vocational upper secondary education	2008	67	50	18	13	77	27
	2000	67	59	20	11	80	27
Employees Participation in CVT courses	2005	34	33	12	14	59	27
	1999	41	37	15	8	61	24
Participation in lifelong learning	2009	17	9	7	1	32	27
	2004	16	9	7	1	29	27
.....							
.....							
INDICATOR K	YEAR 1						
	YEAR2						

Example of Possible note: (for employees participation in CVTS courses the EU value is estimated based on 24 countries. For indicator k the EU value refers to the median of the available data points based on 13 countries, etc.).

Example of short description for the indicators considered:

Students' participation in vocational upper secondary education: students in upper secondary vocational education (% of all upper secondary students)

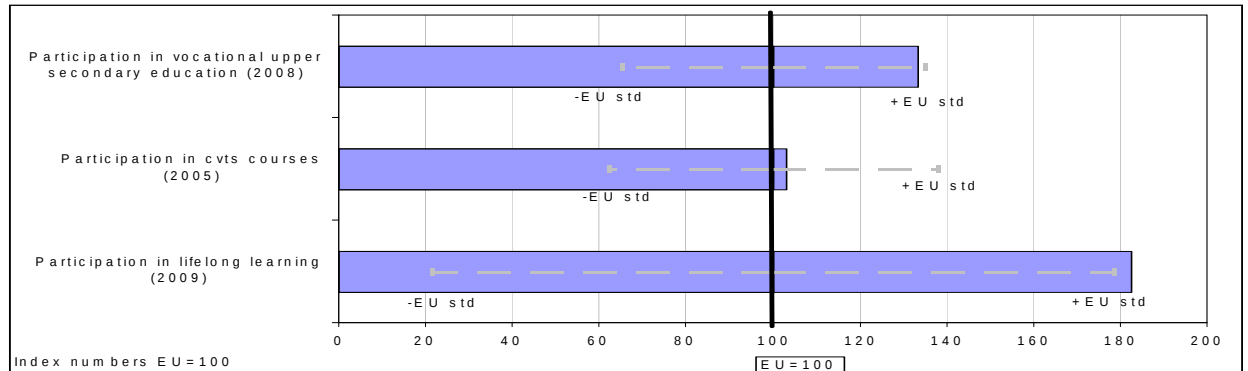
Employees' participation in CVT courses: employees participating in continuing vocational training course (% of all employees in all enterprises)

Participation in lifelong learning: Percentage of the population aged 25-64 participating in education and training over the four weeks prior to the survey comments

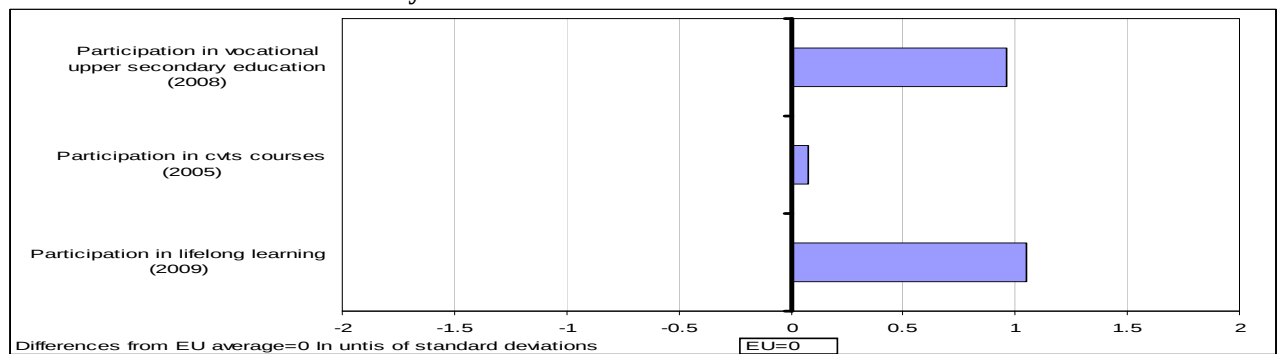
COMMENTS RELATED TO TABLES, CHARTS

Examples of possible solutions for the production of standardized charts

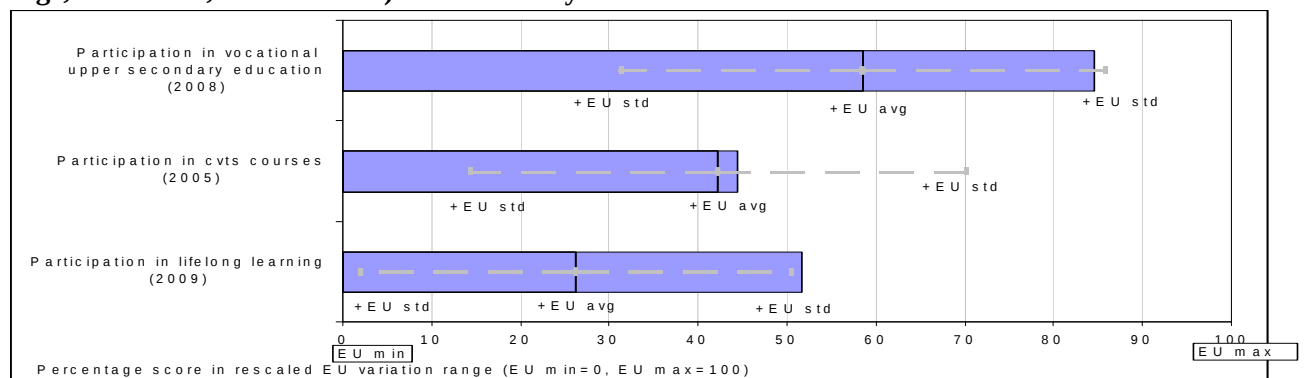
Example 1: Situation in the Netherlands (index numbers EU=100). Most recent year available



Example 2: Situation in the Netherlands (differences from EU average=0, in units of standard deviation. Most recent year available



Example 3: Situation in the Netherlands (percentage scores in the EU rescaled variation range, EU min=0, EU max=100). Most recent year available



ANNEX 5 - FURTHER SPECIFICATIONS FOR WORK PACKAGE 2.2. VET INDICATORS OVERVIEW

The *VET indicators overview* will be constituted by a set of indicators. In each Indicator overview, country data will be contextualized and compared with other country values and possibly with appropriate EU reference values.

The examples below are provided only to illustrate an approach to data presentation and the items that could be presented. Examples should be considered in the light of the specifications provided in point 2.3.2. The contractor is invited to propose improvements/new suitable approaches.

Reference values

The contractor shall identify and present the most appropriate reference values. In doing so, the contractor shall consider the following issues:

- The privileged reference value for the measure of central tendency will be the value related to the EU-27 aggregate.
- For some indicators, data will not be available for all the EU countries. As a consequence:
 - the value of the EU-27 aggregate will not be available²⁵. The contractor shall therefore identify the most appropriate measures to deal with such issue, considering whether and how to replace the EU-27 aggregate (It must be noted that values for more than one country will be shown and that such values could mutually work as reference values).

Presentation

In each indicator overview, levels and, to the extent possible, trends of the short-listed indicators will be presented for all the available countries.

Data will be presented by means of tables and charts. The privileged solution for charts presentation will be the adoption of bar histograms with two columns per country, showing country levels at two different points in time. More complex charts might be considered in particular cases (e.g. when there may be the need to consider multiple dimensions, such as for instance comparisons between VET and general education, comparisons between more than two points in time, etc). Table will be used to illustrate and complement data used in the charts (e.g. to present additional dimensions and/or additional reference times).

Layout

The contractor shall propose at least one possible standard solution for the indicator overview layout. Contractor's proposals included in the tender will be then fine-tuned and agreed between Cedefop and the contractor.

Missing data

The contractor shall exclude from chart presentations, but possibly not from table presentations, countries with missing values for the shortlisted indicators.

Final settings

With respect to the different tasks outlined in this annex, contractor's proposals, included in the tender will be then fine-tuned and agreed between Cedefop and the contractor at inception and interim stages (also taking into account current and future data availability).

²⁵ Most of data that will be used will come from Eurostat (see also paragraph 2.6 on sources and tools for the project). Eurostat publication policy inhibits the publication of EU-27 aggregates when a number of countries have not provided data and/or when countries with particular weight on the overall EU-27 totals have not provided data.

Example: A possible indicative example is provided here below

VET INDICATORS OVERVIEW – POSSIBLE EXAMPLE

EXAMPLE ILLUSTRATING THE MEANING OF THE APPROACH AND POSSIBLE ITEMS TO BE CONSIDERED (to be replicated for each indicator shortlisted)

This example only considers an ideal timeframe 2000-2010 (with appropriate adjustments for availability/consistency of time series). However, additional/different years following 2010 will have to be considered to monitor developments following 2010.

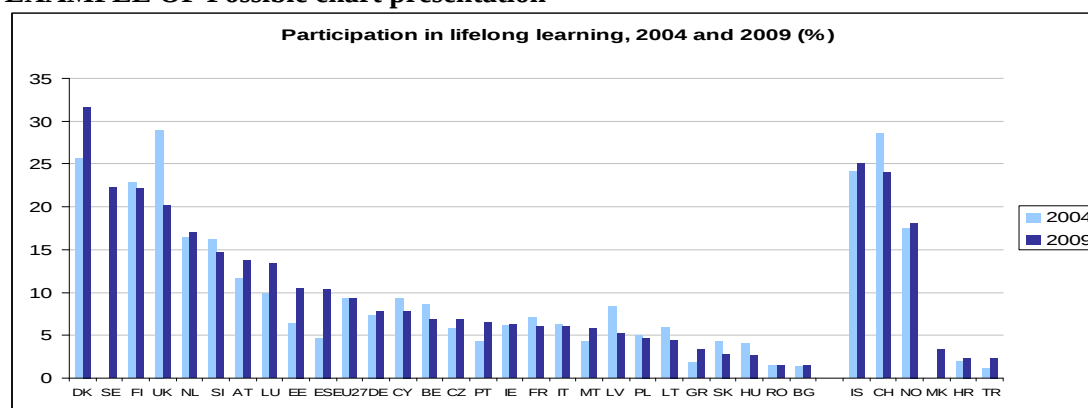
Indicator: Participation in lifelong learning

Short description: Percentage of the population aged 25-64 participating in education and training over the four weeks prior to the survey

Source: Eurostat, Labour Force survey, date of extraction 18.2.2010

Other Items to be considered: tables, charts, notes, footnotes and comments

EXAMPLE OF Possible chart presentation



Footnotes: 2009 data for Malta, Luxembourg, Sweden and EU27 are provisional.

EXAMPLE OF Possible table presentation

Country	2004	2009	2009
EU27	9.3	9.3	(n)
BE	8.6	6.8	
BG	1.3	1.4	
CZ	5.8	6.8	
DK	25.6	31.6	
DE	7.4	7.8	
EE	6.4	10.5	
IE	6.1	6.3	
GR	1.8	3.3	
ES	4.7	10.4	
FR	7.1	6	
IT	6.3	6	
CY	9.3	7.8	
LV	8.4	5.3	
LT	5.9	4.5	
LU	9.8	13.4	(n)
HU	4	2.7	
MT	4.3	5.8	(n)
NL	16.4	17	
AT	11.6	13.8	
PL	5	4.7	
PT	4.3	6.5	
RO	1.5	1.5	
SI	16.2	14.6	
SK	4.3	2.8	
FI	22.8	22.1	
SE	:	22.2	(n)
UK	29	20.1	
IS	24.2	25.1	
LI	:	:	
NO	17.4	18.1	
CH	28.6	24	
ME	:	:	
HR	1.9	2.3	
MK	:	3.3	
TR	1.1	2.3	

Comments (based on data)

ANNEX 6 - FURTHER SPECIFICATIONS ON SELECTED ISSUES FOR PRODUCING AND UPDATING BOTH COUNTRY AND INDICATOR OVERVIEWS

1. Selection and organisation of indicators

After having identified an ideal list of indicators, a shortlist of core, quantitative and currently available indicators has to be produced. The short list will be suitable for adoption in the context of concise statistical publications or data dissemination activities.

2. Retrieving of data (including figures and footnotes)

This task relates to retrieving of data (including figures and footnotes) for all the selected indicators, for all the countries under consideration and for all the years for which data are available. This will be done by making use of Eurostat/OECD on line databases and, if necessary, of special ad-hoc data request to Eurostat for unpublished data (very few cases).

3. Analysis of critical data issues

Analysis of possible critical issues in the retrieved data undermining comparability across countries, over time, and in relation to EU averages, such as: missing values for the EU 27 aggregates; breaks in time series, peculiarities of specific country data (as resulting from flags and footnotes), etc.

Analysis of critical data issues: This task will be performed based on available data (figures and footnotes), and metadata, taking into account Cedefop's inputs and feedbacks.

4. Identification of the most appropriate measures to face critical data issue

Identification of the most appropriate measures to minimize the impact of critical data issues, such as provision for flags and footnotes, calculation/recalculations/ estimation of EU aggregates (e.g. via weighted, unweighted averages or via the median), exclusion of specific figures, identification of the most comparable reliable time series. The contractor shall identify the appropriate way to report and document the critical data issues encountered and adopted solution to minimize their impact.

5. Management/organisation of data

5.1. Design, construction and documentation of a simple and user friendly system (based on Microsoft Excel) able to

- host retrieved data
- manipulate and process retrieved data
- host and present output data

The system will have the following characteristics:

- to be user friendly, so to facilitate Cedefop in carrying out possible future updates
- to be easy to update (as most recent data become available) and possibly easy to modify (as indicators/countries can be added/removed), so to reduce the related workload
- to be functional to the exploitation of the data as described in the following point 6.

The system could be constituted by a simple application, based on Microsoft Excel, and exploiting cells references, so that updates of the input data will automatically generate an update of the output data. See also the paragraph 2.6.3 in the technical specifications.

More complex solutions could be identified, such as for instance mechanisms based on VBA scripts or Excel Macros, which will be able to increase the degree of flexibility and/or to allow additional features (e.g. facilitating the introduction of new indicators/countries, providing a user interface, etc.)

Documentation on the structure and the functioning of the system must be provided.

A distinction will be made between the data as retrieved by the secondary source (retrieved data) and the data as presented in tables and charts (presented data). Both of them will have to be provided to allow for quality comparisons.

Retrieved data will be provided along with the following information:

1. Name of the indicator to which data refer
2. Definition and, if necessary, short description and short explanation of the indicator
3. Primary source (reference to survey/data collection from which data originate)
4. Secondary source of data retrieval (info on whether data are retrieved from Eurostat on line database or, in few cases, from an ad hoc data request addressed to Eurostat, or from other sources)
5. Date of data retrieval (date of online data extraction, date in which ad hoc data have been provided by Eurostat)
6. For data retrieved from Eurostat online database, information on whether data come from one of the Eurostat predefined main tables or from one of Eurostat customizable datasets
7. For data retrieved from Eurostat online database (Eurostat name of the main table/customizable dataset from which data are retrieved)
8. Any possible option selected in the customization of the on line data retrieval (e.g. Years, age groups, gender, other dimensional breakdowns, etc.)
9. Hyperlink to the online main table/dataset used for the on line data retrieval
10. Hyperlink to the relevant metadata.
11. Short and clear text summarising in textual form flags and footnotes, etc.
12. Additional information concerning additional processing of data by the contractor to arrive at the data as presented.

Presented data will only provide a short-list of such information (definition, short description, source, etc).

6. Exploitation of the data.

6.1 Production of a set of tables and charts by country (for Country overviews).

6.2 Production of a set of tables and charts by indicator (for *VET indicators overview*).

7. Production of short comments on data (for *VET Country overviews* and for *VET indicators overview*)

Brief comments based on data will be provided.

- 7.1. Comments for country overviews: Making reference to values shown in chart and tables, comments will provide key information points to help reading the data. Comments could consider those indicators for which the country considered shows a (particularly) good performance; those for which the country considered shows a (particularly) bad performance; those indicators for which the country is approximately in line with the appropriate EU reference values. Comments could also consider data changes over time to stress favourable or unfavourable trends in the country.
- 7.2 Comments for VET indicators overview: Making reference to the values showed in charts and tables, comments will provide key information points to help reading the data. Comments could consider best/worst performing countries with reference to indicator levels. In addition, comments could consider best/worst performing countries with reference to data changes over time. To the extent possible, comments could also consider levels and trends of the indicator for the EU-27 aggregate or for other EU reference values. EU2020 policy benchmarks could also be mentioned where relevant. Cedefop's Statistics of the month will provide useful examples on how to structure short comments.