

FINANCE AND PROCUREMENT

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Thessaloniki, 19 August 2015

OPEN INVITATION TO TENDER

AO/DSI/GKO/Globalisation and VET/011/15
The impact of Globalisation on Vocational Education and Training

 REFERENCE: *Contract notice 2015/S 159-291564 of 19/08/2015*

Tender Specifications

Dear Sir/Madam,

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

The purpose of this call for tenders 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 (and documents included in them) 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. Paraskevaïdis
PO Box 22 427
GR – 55102 Thessaloniki, Greece**

Important:

If using a postal service, tenderers must use a registered, reliable one. If no postmark has been stamped or if the postmark is not legible, Cedefop will accept deposit slip issued by the postal service, provided that this clearly indicates the date as filled in by the post office and not by the tenderer.

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.

Tenderers should not attach their offer to any of the above informative 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)** above):

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service, Attention of Mr G. Paraskevaïdis
123, Europe Str,
GR-57001 Thessaloniki-Pylea, 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/DSI/GKO/Globalisation and VET/011/15 The impact of Globalisation on Vocational Education and Training Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE
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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 section 6 of the attached Tender Specifications.

Tenderers should not disclose their financial offer in any part of their tender other than the sealed envelope C, not even disclose the total amount of their financial offer on the cover letter.

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:

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

Requests for additional information/clarification (if any) from potential tenderers should preferably be written in English and 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.

- Cedefop 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 tenders.

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender Procedure is announced (<http://www.cedefop.europa.eu/en/about-cedefop/public-procurement>.) **Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

7.2 Contacts after the final date for submission of tenders and before opening:

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.

- Tenderers are not allowed to 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 may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process 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).

7.3 Contacts after the opening of tenders:

- Tenderers should not contact Cedefop on their own initiative at that stage.
- If clarification on the compliance with the Eligibility and/or Selection Criteria is required or if obvious clerical errors in the tender need to be corrected Cedefop may contact tenderer/s in writing to obtain further clarification or documents on specific points of the tender or to correct obvious clerical errors.
- If the necessary information and/or 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. Tenderers must not modify their tender or add any new elements to it. The reply must therefore make clear reference to the relevant information already present in the file. This will serve solely the purpose to provide the Evaluation Committee with a clarification regarding the technical proposal provided the terms of the tender are not modified as a result.
- In regards to possible clarifications on obvious clerical errors in the Financial Offer, tenderers must not add any new prices, but only explain the quotation on the basis of elements and prices already present in the offer. In case a tenderer alters his financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.
- Tenderers should be prepared to reply to such requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	24/09/2015	17.00h
Last date on which clarifications are issued by Cedefop	< as soon as possible >	N/A
Deadline for submission of tenders (hand delivered)	02/10/2015	17.00h
Deadline for submission of tenders by post / courier	02/10/2015	N/A
Validity of the tenders	02/04/2016	N/A
Tender opening session	13/10/2015	11.00h
Estimated contract signature date	Beginning of December 2015	

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 should be 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 the 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/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm), 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 this tender procedure.
16. Once Cedefop has opened the tender, the document shall become the property of Cedefop and it shall be treated confidentially.

17. You will be informed of the outcome of this procurement procedure by e-mail. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check it regularly.

Yours sincerely,

G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DSI/GKO/Globalisation and VET/011/15

**The impact of Globalisation on Vocational Education and
Training**

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

Source: <http://www.cedefop.europa.eu/EN/about-cedefop.aspx>

To provide people with the skills they need, vocational education and training systems (VET) need to adapt quickly to changing demands. European VET policy's central aim is to promote excellence through VET. To make it both an attractive learning option for the brightest and best young people and adults and an effective way of helping those with low levels of qualification to develop their skills.

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ⁽¹⁾ and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

Modern VET systems must be relevant to individual and labour market needs. They should take into account learning acquired in different ways (for example through work experience) and at different times and allow people to move between countries and sectors.

Member States decide national VET policies and Cedefop monitors and reports on the reforms and changes they make to their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with Member States and social partners, has agreed shared objectives. As part of this cooperation, Cedefop has helped develop, and is now working to implement, common European tools and principles, which aim to make it both easier to work and study abroad and move between different parts of a national education and training system (for example between general and vocational education).

- **Careers and transitions – Continuing VET, adult and work-based learning**

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness. New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

⁽¹⁾ Cedefop also works with Iceland and Norway.

- **Analysing skills needs to inform VET provision**

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and job requirements.

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States. Cedefop is also finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year.

In addition to its web portal www.cedefop.europa.eu, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and Twitter at www.twitter.com/cedefop.

1. OVERVIEW OF THIS TENDER PROCEDURE

In submitting his/her tender in response to this tender procedure, 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/her own conditions of sale and terms of business may be, which he/she hereby waives. No account can be taken of any reservation or disclaimer expressed in the tender as regards the tender dossier's Tender Conditions and Specifications and the Contract's Special and General Conditions. 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 or disclaimer may result in the rejection of the tender without further evaluation on the grounds that it does not comply with the conditions of the Tender Dossier.

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 Technical and Financial Proposals containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

- a) Title of the contract: The impact of Globalisation on Vocational Education and Training
- b) Short description of content of this contract: The focus of this study is about the responsiveness of national VET (initial VET and continuous VET, including VET at higher levels) systems and qualifications to the changing requirements of VET in Europe and across the world. This study will examine how globalisation influences the review and renewal of VET content and the way it is defined and described.
- c) Type of contract: Service contract (study contract related to research).

1.2. Place of delivery or performance

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

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers **may not** offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The estimated budget for the required services described in this call for tenders is of the order of **350,000 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 duration of **24 months**.

1.7. Main terms of financing and payment

Payments will be made within **30/60** days of submission of invoices as per the terms of the contract and acceptance of the interim report, final report and policy handbook.

2. TERMS OF REFERENCE

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

2.1. Definitions

The globalisation of trade and communications with new technological advancements is a reality which increases competition for markets and mobility of skilled workers across countries. Globalisation is commonly understood as ‘the rapid acceleration of cross-border flows of capital, goods, services, people and ideas’ (Green 2007)². Given the value of intellectual capital in a globalised economy, many countries are attempting to upgrade their human capital through promoting wider access to a range of skills (OECD 1996)³.

Globalisation in the education and training world is mostly perceived as something threatening from the outside. Internationalisation is first and foremost perceived as a development strategy which is vital for the survival of individual companies or educational/training institutions in the face of global competition. In other words internationalisation is a form of defence against the threat of globalisation (Risager 2000)⁴. Along the same lines Knight (1999)⁵ sees internationalisation as a response to globalisation.

In a globalised world it is important for holders of vocational qualifications to have the right mix of competences as is for companies to be able to compete in the international world of businesses. Rapid technological and economic change requires constant modernisation of qualifications and occupations as new occupations are emerging and cross-sectoral and occupation specific competences as well as transversal competences are gaining importance (Cedefop 2013a)⁶. Consequently, VET systems need to respond quickly to changes in the occupational structures, as well as in knowledge, skills and competence requirements. Increasingly the ‘internationalisation of markets has gradually transformed VET into a system with a much stronger dependence on interacting with markets outside local communities and beyond national boundaries’ (Coles and Leney, 2009, p. 424)⁷. Siikaniemi captures in a simple schematic way the connection of vocational education and training to the global challenge of markets (Siikaniemi 2007).⁸

² Green, A. 1997, *Education, globalisation and the nation state*, Basingstoke: Macmillan.

³ OECD. 1996. *The Knowledge-Based Economy*. Paris: Author.

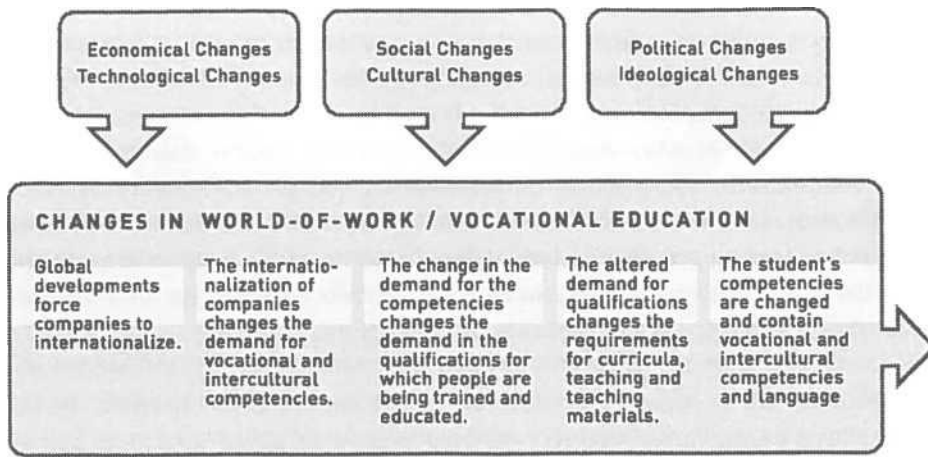
⁴ Risager, K. 2000. Globalisation and internationalisation: two conflicting discourses. In *Internationalising vocational education and training in Europe*, Cedefop Panorama Series. 17-21

⁵ Knight, J. 1999, Issues and Trends in Internationalization; A Comparative Perspective, In S., L. Bond & J-R, Lemasson (Eds.), *A New World of Knowledge*, Canadian Universities and Globalization, Canada: International Development Research Centre (IDRC). Available at: <http://www.idrc.ca/en>, Printed 17.7.2006.

⁶ Cedefop, 2013a, The role of qualifications in governing occupations and professions, <http://www.cedefop.europa.eu/en/publications-and-resources/publications/6120>

⁷ Coles, M.; Leney, T. (2009), The regional perspective of vocational education and training. In: Maclean, R.; Wilson, D. (eds), *International handbook of education for the changing world of work*. Dordrecht: Springer, Vol. 1, pp. 411-425.

⁸ Siikaniemi, L. 2007. Vocational Educations meets Globalization, Lahti University of Applied Sciences, Research report, part 11.



2.2. The EU policy context

At European level the Ministers in charge of VET of EU Member States, candidate countries and EEA have recently acknowledged the importance of a responsive VET to contribute to the international competitiveness of the labour force in a global context (Riga Conclusions 2015). During their meeting with the European social partners and the European Commission it was agreed that performance of European VET systems 'will depend (among others) on its ability to adapt to the changing needs in the economy and society at large'. It is time to intensify European cooperation in VET in a globalised environment by keeping a balance between local economic skills' needs and the dynamics of global value chains⁹. This reiterates the strategic objective number 4 of the Bruges Communiqué to developing a strategic approach to the internationalisation of IVET and CVET¹⁰.

This "globalised" perspective was also highlighted in Commissioner's Marianne Thyssen opening speech at the Meeting with Ministers in charge of VET & European Social Partners – Innovating for the future of VET (Riga, June 2015): *"In terms of recognition, we are collaborating with various economic sectors to link the recognition of qualifications awarded by international sectorial bodies or multinational companies to the European Qualifications Framework. These could be diverse qualifications from ICT to banking or welding. We are also looking at cooperation with third countries to boost qualifications transparency between the EU and other parts of the world"*.

The European Commission has launched a number of initiatives and projects to support the responsiveness of VET systems to changing labour market needs and is leading a multi-stakeholder partnership, the Grand Coalition for Digital Jobs, a collaborative effort in Europe aimed at offering more ICT training co-designed with the industry; implementing job placement programmes; providing more digitally aligned degrees and curricula at all levels and types of training and education to tackle the lack of digital skills in Europe¹¹. DG Education and Training has launched the Sector Skills Alliances which aim at tackling skills gaps by promoting transversal partnerships between VET stakeholders. DG Growth cooperates with the European Free Trade Association and the European Standardisation Organisations (CEN, CENELEC, ETSI) in the

⁹ Background document for the debate during the meeting of Ministers in charge of VET, the European Social Partners and the European Commission, 22 June 2015 in Riga

¹⁰ Council of the European Union; European Commission (2010), *The Bruges communiqué*
<http://libserver.cedefop.europa.eu/vetelib/2010/75928.pdf>

¹¹ <http://ec.europa.eu/digital-agenda/en/digital-jobs-0#Article>

development of standards¹² which can be used to support EU legislation and policies¹³. It also keeps an eye on developments outside the EU by cooperating with international bodies and governments such as the Asian countries in the Asia-Europe Meeting (ASEM)¹⁴ in the field of vocational training, skills development and qualifications frameworks. In this cooperation the EQF is seen as a powerful tool to facilitate discussion and to describe profiles and qualification requirements in a global context. In addition DG Employment, Social Affairs and Inclusion nurtures European cooperation at sectoral level with the setting up of European Sector Skills Councils designed to anticipate the need for skills in specific sectors more effectively and achieve a better match between skills and labour market needs¹⁵.

2.3. VET systems' responses to globalisation

European countries understand the challenges that must be met by education and training systems brought by an environment that is becoming more and more international. They understand the need to broaden their national perspectives and to strengthen the competitiveness of their economy by integrating an international and global dimension when they develop and update their qualifications, programmes and curricula (Norwegian Ministry of Education and Research 2009)¹⁶, (Finish National Board of Education, HAMK, CIMO 2009)¹⁷, (Dutch Ministry of Education Culture and Science 2009)¹⁸. Germany for example has set up the German Office for International Cooperation in Vocational Education and Training¹⁹ to deal with related issues in a coordinated way.

In a globalised competitive environment countries benefit from standards developed by the European Standardisation Organisations and other international or sectoral organisations²⁰ and use them to inform their own national standards and qualification requirements. There are cases where national qualifications are based on international legislation like for example in the aviation, maritime and transport sector. This also holds true for qualifications of regulated professions which are treated under the European Directive 2005/36/EC on professional qualifications. A recent example is the Sectoral Qualifications Framework for Border Guarding²¹, a common European reference developed by FRONTEX (an EU agency) and its network of national members describing the competence profiles and training standards for border guard professionals.

¹² By standards we refer to educational and occupational standards. For more information on the definition of standards you may consult: Cedefop, 2014. Terminology of European education and training policy: <http://www.cedefop.europa.eu/en/publications-and-resources/publications/4117>

¹³ http://ec.europa.eu/growth/single-market/european-standards/index_en.htm

¹⁴ http://ec.europa.eu/growth/industry/international-aspects/cooperation-regions/asean-asem/index_en.htm

¹⁵ <http://ec.europa.eu/social/main.jsp?catId=784&langId=en>

¹⁶ Norwegian Ministry of Education and Research, 2009, Internationalisation of Education in Norway

¹⁷ Finish National Board of Education, HAMK, CIMO. 2009. Increasing the quality and effectiveness of the management of internationalisation.

¹⁸ http://www.cinopadvies.nl/94_2860_MBO_Internationalisation_Agenda.aspx

¹⁹ http://www.bibb.de/en/govet_2352.php

²⁰ In this study by "International organisations" we refer to bodies, institutions, associations, or private companies that develop VET qualifications standards and training programmes, provide training and/or award international or sectoral qualifications.

²¹ <https://www.youtube.com/watch?v=mSyZwGnhLiw>

In addition we find cases where national VET and qualifications structures coexist with international sector²² based structures. This is the case of Welders where national training bodies authorised by the national welding federations use international welding standards²³ to provide training, examination and certification of welders under this system.

On the other hand there are cases where sectors are increasingly seeking international agreements to describe occupational profiles and develop their skills and qualifications – for example in the sports sector - without involving national (public) authorities (Cedefop 2013a)²⁴. Cedefop's publication on International qualifications²⁵ shows that there are international solutions²⁶ both sector and company based – like for instance in finance, banking and ICT - that follow international standards and compete with national ones.

An important resource for national authorities in developing standards to address the skills gap in a globalised environment is the work carried out by WorldSkills. WorldSkills acknowledge the importance of relevant and current industry- and business-led standards and the need to support an internationally competitive economy through clear links with global standards²⁷. WorldSkills standard specifications are subject to consultation with industry and are systematically reviewed every two years through the WorldSkills Competition cycle. Countries like the UK, Finland and Switzerland have achieved affinity between their national systems and these global standards (AoC 2014)²⁸ embedding them into training programmes.

EU Countries cooperate to improve their VET systems and make sure they are in line with developments in a given sector worldwide (European Commission 2015)²⁹. They organise exchange between ministries, VET standards-setting institutions, VET providers and businesses to explore opportunities to internationalise VET. They sometimes join forces to develop common core modules based on agreed learning outcomes. Such European cooperation allows VET systems to build on their well-established links to local economy and society ensuring at the same time the right balance between the responsiveness of VET systems to local needs and their flexibility to adapt to global challenges. The above Commission report refers also to cooperation of EU countries with non-European countries – for instance the U.S.A/Denmark partnership for Vocational Education - to exchange views on issues related to the development of skills standards, curriculum development and assessment.

In some European countries Sectoral Skills Councils (SSC) contribute to shaping national VET strategy and responding to changing market needs. They focus on one specific sector of the national economy, provide a platform for cooperation between stakeholders in the sector, gain

²² 'Sector' means a grouping of professional activities on the basis of their main economic function, product, service or technology

²³ These standards are developed under the supervision of the European Welding Federation and the International Institute for Welding

²⁴ Cedefop, 2013a, The role of qualifications in governing occupations and professions, <http://www.cedefop.europa.eu/en/publications-and-resources/publications/6120>

²⁵ Cedefop, 2012, International qualifications <http://www.cedefop.europa.eu/en/publications-and-resources/publications/4116>

²⁶ By "solutions" we mean international qualifications or any VET standards that refer to qualification requirements, training programmes, curricula etc.

²⁷ <https://www.worldskills.org/what/education-and-training/>

²⁸ Association of Colleges (AoC), 2014, Global standards: bridging the skills gap. <https://www.worldskills.org/what/education-and-training/global-standards-bridging-skills-gap>

²⁹ European Commission, 2015, Building knowledge on international cooperation in VET. Final Report <http://ec.europa.eu/social/BlobServlet?docId=14031&langId=en>

insights on the likely developments of employment and skill needs and make a contribution to policy-making shaping VET and qualification standards (European Commission and Ecorys, 2010)³⁰. Due to the common European labour market and the driving forces of technological development and free movement of people/labour, SSC are likely to open up and participate in European and sectoral discussions (Cedefop 2013b)³¹.

At the micro level VET providers actively pursue – sometimes without the direct support of national public authorities – the aim of covering gaps in the skillset of their local workforce by seeking cooperation with companies and other ‘advanced’ peers from abroad. This often happens by using European programmes and resources like for example the ESF or LdV/LLP funds to establish cooperation across countries in a specific sector. The Commission’s database on LdV projects and products (adam³²) provides information on a number of projects³³ that developed common occupational profiles, qualification standards and/or training programmes for a qualification. The problem however with these projects is how to make them sustainable even after the EU funding is over.

2.4. Overall objectives and expected results

The focus of this study is about the responsiveness of national VET (initial VET and continuous VET, including VET at higher levels) systems and qualifications to changing requirements of VET in Europe and across the world³⁴. This study will examine how globalisation influences the review and renewal of VET content and the way it is defined and described. It will look at the synergies and competition between European and International sectoral standards and qualifications with national ones.

It will look for empirical evidence in a sample of fifteen selected countries and in five economic sectors. The sample of countries must be representative with regards to the coverage of the EU-member states, the type (school based, work based, combination) and governance (centralised, decentralised) of VET system and labour market arrangements. The content and profile of qualifications in five selected sectors should be explored. The selected sectors should be facing major transformation and rapid/radical changes in occupational structure and skills requirements as a result of globalisation. In addition to the overview in fifteen (15) selected countries, ten (10) case studies from different countries and sectors will identify and analyse arrangements and practices in more detail. Different stakeholders should be interviewed at international, European, national and local level.

The study will develop key messages and recommendations for stakeholders (policy makers, providers, employers) at national and European level to develop VET content according to the

³⁰ European Commission; Ecorys (2010). Sector councils on employment and skills at the EU level: a study into their feasibility and potential impact. <http://ec.europa.eu/social/BlobServlet?docId=4763&langId=en>

³¹ Cedefop, 2013b, Renewing VET provision: Understanding feedback mechanisms between initial VET and the labour market. <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5537>

³² <http://www.adam-europe.eu/adam/homepageView.htm#.VZ9sNF-gpBc>

³³ One project is the ‘Sustainable professionalisation’ (2001-2003) which allowed nine participating states to develop a methodology for the construction of common European qualification standards (*référentiels*) for *accommodation manager* in the hotel sector and *logistics technician* in the automobile manufacturing sector.

³⁴ This study is not related to the mobility of students and teachers or to “education export” - it is about the content of VET skills, qualifications and provision.

needs of an increasingly globalised labour market in which European and international sectoral VET solutions³⁵ meet national ones.

2.5. The research questions

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

1. To what extent VET systems review their national standards as an explicit response to globalisation/internationalisation?
 - a. Is this expressed as a national strategy, a priority or in an implicit way?
 - b. How does this take place: in relation to standards, the qualification requirements and the way qualifications are described (in terms of learning outcomes and/or competences), in relation to content of curricula, etc.? Which are the active stakeholders in the VET system to respond to global requirements?
 - c. Which types/models³⁶ of VET systems are more likely to respond to global changes? Which are the reasons for this?
2. To what extent do European and international sectoral standards and qualifications influence national qualification requirements, VET training programmes and curricula?
 - a. Are they being combined with national ones?
 - b. Do they compete with each other?
 - c. In which economic sectors are they most common? Which are the reasons for this?
3. Do European and international sectoral standards add value to national VET systems?
 - a. How can they best be incorporated in national qualifications and curricula?
 - b. Are they likely to be accepted by national authorities and providers? Under which conditions?
 - c. How can different stakeholders (involved in the creation of standards, curricula, etc.) be coordinated to have a systematic approach? How can trust and acceptance be increased?

2.6. Scope of the work

2.6.1 Description of tasks and methodology

The contractor shall carry out the following tasks:

1. Review and assess evidence from the literature

The contractor shall conduct a literature review of existing sources on the basis of national, European and international sectoral developments informing additional and complementary research at national level. In particular the contractor is expected to:

- Collect and analyse evidence from existing literature on the effect of globalisation and the way European and international standards influence the review and renewal of national VET provision, providing an **overview of policy developments** in all Member States;

³⁵ By “solutions” we mean any VET qualifications and standards that refer to qualification requirements, training programmes, curricula etc.

³⁶ See for example the main models of feedback mechanisms identified in Cedefop’s Research Paper “Renewing VET provision - Understanding feedback mechanisms between initial VET and the labour market”. <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5537>

- Critically appraise the literature and summarise the findings in order to develop an analytical model that will support the empirical research in task 2.

2. Design and implement empirical research to generate evidence on the effect of globalisation in national VET provision

i) Comparative analysis in fifteen countries

The contractor will undertake a **qualitative analysis to collect primary and in-depth information in fifteen European countries** to answer the key research questions. Due to the number of countries and the potentially high number of stakeholders involved, the contractor is recommended to use a combination of standardised surveys and in-depth interviews.

The definition of concrete **criteria for the selection of 15 countries and five economic sectors** is an important part of the research methodology. The contractor should address sectors and/or fields of activity areas facing different rates and forms of technological, institutional and economic change. While some VET qualifications are delivered in a relatively stable environment with clearly defined occupational borderlines and requirements, others are delivered in a situation of rapid and radical change, sometimes resulting in new occupations or combinations of occupations. The Commission's Communication on Rethinking education³⁷ and the Employment package³⁸ indicate sectors that are important for economic recovery and growth in Europe and that are expected to face emerging and replacement skill needs.

The contractor needs to give priority to reaching **stakeholders involved at different levels: international, national, sectoral, regional and local**. Information must be collected from stakeholders at

- European and International level (bodies, institutions, associations and private companies that develop VET qualifications standards and training programmes, provide training and/or award international/sectoral qualifications)
- system level (responsible ministries and regional authorities, VET standards-setting authorities, qualifications authorities and awarding bodies) renewing and reviewing national VET standards
- sectoral level (social partners, professional organisations, sector skills councils,) implementing international qualification and training standards
- VET providers involved in European cooperation to update their training programmes and curricula following European/international/sectoral standards
- companies/enterprises and professionals that are using international qualifications and who can explain how they are positioned in the market compared to national ones.

The selection of stakeholders to participate in surveys and take part in in-depth interviews is of critical importance. Interviews should take place in sectors of economy³⁹ that are

³⁷ European Commission (2012), Rethinking education: Investing in skills for better socio-economic outcomes. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM(2012) 669 final.

³⁸ <http://ec.europa.eu/social/main.jsp?catId=1039>

³⁹ Sectoral social dialogue committees in DG Employment website
<http://ec.europa.eu/social/main.jsp?catId=480&langId=en>

affected most by changes in the global market in each of the fifteen selected countries to collect information on the internationalisation related strategies and priorities to renewing national VET standards and responding to European and international sectoral solutions. It is expected to have a minimum of 18 interviews per country in different sectors and at least 20 interviews at European and international level.

ii) In-depth analysis of ten case studies

While the contractor must ensure comparative data as regards national practices and systems, **ten in-depth case studies in different countries addressing the situation in the five economic sectors** and for specific international standards and/or qualifications should be selected to identify and analyse arrangements and practices in more detail. The selection of case studies should be made using a mix of economic sectors, governance and models of VET systems. It is expected to have a minimum of 10 interviews per case study in order to collect evidence from different stakeholders (see different types mentioned above) and understand how the chosen international qualifications and/or standards in a given sector are embedded or compete with similar ones in the national VET systems across countries.

The criteria for the selection of sectors, countries and case studies, as they have been proposed in the technical proposal by the successful tenderer, will be discussed and agreed with Cedefop's project manager(s) in the inception phase. These case studies can be developed using a mix of methods (in-depth interviews, focus groups, site visits, etc.). Taking into account the complexity of the topic and the number of stakeholders involved the contractor must pay particular attention to the methodological challenges involved on how to best organise the research.

3. Provide key messages and recommendations

The contractor shall combine the literature review and the empirical research carried out in tasks 1 and 2 to address the research questions in section 2.5 and provide key messages and make recommendations to policy makers and other stakeholders at national, European, international and sectoral level.

2.6.2 Networking with national experts and stakeholders

The contractor shall assemble the team necessary to execute, manage and coordinate the study. In order to ensure high quality results, the contractor is advised to rely on a team of experts/consortia across different countries to carry out country context analysis, identify and reach the stakeholders to participate in the in-depth interviews, surveys, focus groups and other research methods and to validate the findings and key policy messages.

2.7. Reports

The following deliverables in English will be required. All deliverables should be shared with Cedefop in draft versions before they are delivered as final to Cedefop. Copies of the reports referred to must be submitted to the project manager identified in the contract.

1) An inception report

A draft inception report within 3 weeks and the final inception report **six weeks** after the contract is signed by the last contracting party, which refines the methodology proposed in the tender, outlining the inputs and expected outputs and outcomes for the different tasks. It shall include:

- an updated work plan and timetable;
- the criteria and a list of the proposed fifteen countries and economic sectors that will be examined in detail;
- criteria for the selection of the ten case studies;
- a proposal of research tools (e.g. draft of questionnaires/interview grids, tools for the analysis of secondary data, a detailed list of key stakeholders and institutions to be contacted, etc.).

Cedefop will provide comments on the draft inception report. The contractor should address those comments, liaising closely with Cedefop's project manager.

2) Interim Report

A draft Interim Report is due within 11 months and the final interim within **13 months** after the contract is signed by the last contracting party, which will include:

- a complete overview of developments in the Member States with the findings of the desk research;
- detailed methodology and the analytical model for the empirical research including the final version of the tools for data collection and analysis;
- preliminary findings of the comparative analysis in the fifteen selected countries in accordance with the questions listed in chapter 2.5;
- identification of case studies and countries that have been selected for the in-depth analysis;
- a detailed timetable for the completion of further work;
- a list of data sources, including bibliographical data;
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of final report;
- a proposed outline of the final report and the policy handbook.

The interim report should be the basis for further developing the empirical research and for the preparation of the final report. Cedefop will provide comments on the Interim report. The Contractor should address those comments in view of the continuation of work and of the draft Final Report, liaising closely with Cedefop's project manager.

3) Draft Final report and final report

The draft final report covering all findings and deliverables of the three tasks in the assignment must be submitted within 19 months and a final report (approx. 100 pages excluding the annexes) within **21 months** after the contract is signed by the last contracting party, which will include:

- an introduction
- an executive summary highlighting main findings and key policy recommendations for the future (approx. 10 pages), which can also be distributed as a self-standing document;
- a comparative analysis of developments and approaches, identifying trends and actions, gaps and challenges across the countries under consideration, illustrated with national examples that should be embedded in the text for the fifteen selected countries;
- an in depth analysis of case studies in a range of sectors selected;
- key messages, recommendations and lessons learnt for the different stakeholders concerned with VET policy making and practitioners at national and European level;

- Bibliography and annexes (including glossary of main terms, list of abbreviations, full description of the methodology and analytical model, research tools, interviewees, a full set of data and other relevant information, etc.).

4) A policy handbook

Building upon and expanding the executive summary of the final report, this policy handbook (maximum length 40 pages) will contain policy recommendations for national and European stakeholders. It will describe the benefits of reviewing and renewing national VET qualifications to respond to the challenges posed by globalisation and of creating synergies between national, European and international VET provision. It will also be proposing necessary conditions for these synergies to work well in the different VET systems. The final content of the policy handbook will be agreed with Cedefop in the last phase of the research project. A draft must be submitted within 20 months and the final one within 22 months after the contract is signed by Cedefop.

5) Proposal for a video production

A proposal⁴⁰ for a short video production (concept, structure) must be submitted within **22 months** after the contract is signed by Cedefop including a list of interviewees (policy makers, companies and professionals) who are willing to talk about the benefits of the synergies of European and international sectoral standards and national VET systems. The exact concept and technical requirements will be fine-tuned and agreed with Cedefop during the final months of the assignment.

Cedefop reserves the right to ask for any background data, evidence of computations and the qualitative models used in the analysis carried out by the Contractor. Cedefop will provide comments on the draft deliverables. The Contractor will address those comments, in close collaboration with Cedefop's designated project manager.

The contractor shall submit all deliverables in English, in hard copy and electronic format. Figures and tables should be delivered in Excel or in Word, as appropriate. Excel charts should include the data tables that allow modifying or reproducing the charts, if needed. The full data set of the interviewed should also be submitted in an agreed electronic format. The electronic versions should fully correspond to the hard copies.

The Contractor shall ensure that all reports submitted to Cedefop have been subject to professional proof-reading and editing in English. The cost for this should be included in the Financial proposal (Table in point 5.4, item 2c). Layout and formatting should follow the Cedefop style manual (see Annex H of the Tender Specifications).

2.8. Meeting and travel expenses

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

- a kick-off meeting 3 to 4 weeks following signature of the contract to fine-tune the final planning of the activities and services described in the draft inception report;
- a meeting to discuss the draft interim report and preliminary findings, monitor progress and agree on the case studies to be carried out and the outline of the final report a month after submission of the draft interim report;
- a meeting to discuss and improve the final outcomes and key policy messages included in the draft final report a month after its submission to Cedefop.

⁴⁰ The video production is not subject to this call and will be carried out directly by Cedefop.

For quality assurance purposes and wide dissemination of project's findings, Cedefop may decide to hold an expert workshop to discuss and enrich the final research outcomes. This event will be organized by Cedefop. The contractor might be asked to support Cedefop in defining the workshop's agenda and identify potential audience and speakers. The Contractor might also be asked to participate in this event (with 2 persons).

All costs incurred, including travel & accommodation related to the three Cedefop's meetings described above as well as any travel expenses that may occur in performing the tasks as described in point 2.6.1, have to be included in the Financial offer (see Table in point 5.4, items 2a and 2b respectively).

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

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

3.1. Exclusion criteria

Participation to this tender procedure 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, given in Annex C. Therefore all tenderers, all group (consortium) members (if any) and any subcontractor/s (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. The exclusion criteria will be assessed in relation to each company individually.

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

In the event of recommendation for contract award, point j) of Annex C will apply.

3.2. Selection criteria

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

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

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

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. He must in that case prove to the contracting authority that he will have at his disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed statements from those entities. Please note that natural persons (individuals, freelancers) are also considered 'entities' for this purpose.

3.2.1. Economic and Financial capacity

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

Requirements:

- The average annual turnover of the tenderer for the last **three** financial years (2012, 2013, 2014) concerning the type of services covered in this call for tenders should be at least **175,000 €**.

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

- Signed Statement (Please fill-in and sign your Statement in **Questionnaire 2 of Annex G**) of the tenderer's turnover for the last **three** financial years concerning the type of services similar in nature to those making the subject of this call for tenders.

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

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) 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. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors. For tenderers or sub-contractors (identified as per any of the two bullet-points in paragraph 4 of Art. 4.2 below) who are natural persons / freelancers, a tax declaration and tax clearance statement for the last three financial years will be requested.

If, for some exceptional reason the winning tenderer (or any consortium member or sub-contractor) is unable to provide one or other of the above documents, he or she will be 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

The Tenderers are required to have sufficient technical and professional capacity to perform the contract.

They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference.

Requirements for Technical and professional capacity:

- At least **3** contracts performed in the past three (**3**) years covering the field of research and comparative analysis on vocational education and training at European level;
- The Tenderer's **KEY** experts, whose involvement will be instrumental for the implementation of the contract, must have the relevant to the subject of the contract profiles, knowledge and experience for its successful implementation. In particular:

The Project Leader must possess:

- A University degree;
- At least five (5) years' individual experience of leading and organising a team of international experts in comparative analysis of (vocational) education and training at European and/or international level;
- At least five (5) years' individual experience in vocational education and training systems and developments in Europe, as well as their relationship with European and international sectoral developments and the labour market, proven by relevant publications and involvement in projects;

- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Each Project team member must possess:

- A University degree;
- At least three (3) years’ individual experience working in comparative analysis of vocational education and training at European and/or international level;
- At least three (3) years’ individual experience in empirical research methodologies and qualitative and quantitative data analysis, including related technologies, proven by relevant publications or involvement in relevant projects;
- Languages: Linguistic ability to communicate and draft to a high standard in English (Level C1 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

Each Country expert must fulfil the following requirements related to the education and training system of their country or a relevant area, as follows:

- A University degree;
- Minimum three (3) years’ individual experience in policy analysis and/or comparative research in the fields of vocational training in the relevant country, proven by relevant publications or involvement in project(s);
- Languages: Linguistic ability to communicate and draft in English (Level B2 as determined in “Language levels of the Common European Framework of Reference (CEF)”).

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 profile (**please fill-in Annex G-Questionnaire 4**);
- List of contracts performed in the past **three (3)** years similar to the scope, size and nature as those required in this call for tenders, describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Annex G-Questionnaire 3**);
- The Europass curriculum vitae format (<http://europass.cedefop.europa.eu>) shall be filled in by each person involved in the execution of the tasks foreseen in the tender (Project leader, project team members and country experts). CVs must clearly specify at the top the role(s) of the expert in the team. **Each CV must include a brief Annex synthesising information aimed at demonstrating the professional capacity of the team member as above requested.** In particular the Annex should clearly indicate which work experiences are relevant for the fulfilment of the specific aforementioned requirements (specifying dates, employer, and main activities and responsibilities), and clearly present the linguistic abilities, in particular in English. The CV of the project leader should also include a list of publications relevant to the subject of the call, to which the proposed team member has participated.

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 (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

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 PROCEDURE

Participation in Cedefop 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 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 35 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 4 SAA Countries (FYROM, Albania, Serbia and Montenegro).

The procurement (tender) procedures of Cedefop are **not** open to tenderers from GPA countries.

A 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.

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers.

The tenderer must clearly indicate the identity of each Subcontractor and the percentage of work by value that he will perform for this contract (please fill in Annex G).

Only in cases when:

- a Subcontractor undertakes between 10% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

the tenderer should submit with the offer:

1. the Declaration on exclusion criteria and absence of conflict of interest (Annex C) filled-in and signed by the respective Subcontractor;
2. the required documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2;

3. 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.

5. AWARD OF THE CONTRACT

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

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

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

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

Whereby:

TQV = Total Quality Value of the tender (as per points 5.1 and 5.2);

TFO = Total Financial Offer of the tender (as per points 5.3 and 5.4);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to **(70)**;

Y is the weighting for price (TFO) and for this tender procedure it is fixed to **(30)**.

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for each award (evaluation) criterion and in total a minimum of **60** out of 100 points (TQV) in the technical evaluation – see below).

5.1. Technical evaluation

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

The following Award Criteria for the technical evaluation will be applied to this tender procedure:

The evaluation will be carried out on the basis of the following technical award criteria:

- **Award criterion 1 – The level of understanding of the nature of the assignment, its context and results to be achieved (40 points)**
 - Demonstration of an in depth knowledge and of understanding of the assignment and the results to be achieved (10 points);
 - Demonstration of an in depth knowledge and of understanding of policies and practices relevant to the renewal of standards and curricula, qualifications requirements and the way qualifications are described in terms of learning outcomes as a response to globalisation/internationalisation (15 points);
 - Demonstration of an in depth knowledge and of understanding of the relationship between national qualifications requirements, VET programmes and curricula and the European/international sectoral standards and qualifications (15 points).

➤ **Award criterion 2 – The quality and appropriateness of the methods suggested to carry out the work (30 points)**

Relevance and soundness of the comparative methodological approach proposed in terms of terminology, methodology for data collection and analysis, envisaged steps and data sources to be used as well as challenges involved in the methodological approach for this specific assignment (15 points);

- Rationale and proposed criteria for the selection of countries, case studies and sectors as well as type of institutions and stakeholders to be interviewed for the assignment (15 points).

➤ **Award criterion 3 – The organisation and management arrangements (30 points)**

- Allocation of tasks, type and degree of involvement of the proposed experts (20 points);
- Project organisation and mechanisms to guarantee successful and on-time delivery of the tasks as defined in the terms of reference within the deadline given (clarity, coherence and feasibility of the work programme and timetable) (10 points).

In order to guarantee a minimum threshold of quality, offers that do not reach a minimum of 50% of the possible score for each award criterion, will be eliminated from further evaluation. Tenders scoring less than **60** (of a maximum of 100) points against the award (technical) criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2. Technical proposal

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, detailed description of the services proposed for performance of the contract.

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. It is up to the tenderer to present in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full with) all requirements outlined in the Terms of Reference.

Tenderers are requested to include their technical proposal (envelope B) in one original and three hard copies and in a form of a read access secured CD.

The content of the technical proposal in the hard copies and the one in the CD must be identical.

In case of discrepancies between the hard copies and the CD, the hard copies shall take precedence.

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

For award criterion 1

- Discussion on the scope of the assignment and the results to be achieved;

- Discussion on the diversity in vocational education and training in Europe and related policies and practices relevant to the renewal of standards and curricula, qualifications requirements and the way qualifications are described in terms of learning outcomes as a response to globalisation/internationalisation
- Discussion on the way globalisation affects VET systems and the relationship between national VET systems and European and International sectoral solutions (i.e. qualifications, training programmes, curricula).

For award criterion 2

- A clear presentation of the research methodology, tools and approaches, its strengths as well as its limitations, the type of data required and the challenges involved in reaching relevant stakeholders (at national, European, international and sectoral level)
- A clear presentation of the approach and criteria used to select countries, sectors, types and number of stakeholders to be interviewed at national, sectoral European and international level.

For award criterion 3

- A detailed work plan illustrating intended organisation and management of the tasks and human resources
- Description of deliverables including a clear timetable, the challenges and an assessment of risks involved in carrying out the project.

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

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

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

5.3. Financial evaluation

Only tenders scoring in total **60** points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Price** offered (**Total Financial Offer TFO**) 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 Financial Proposal / Financial Proposal of the tender considered) Y.*
Where Y = price weighting (see the complete formula under point 5 above)

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. [For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.]

[For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.]

[In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".]

5.4. Financial Proposal / Financial Scenario

The Financial Proposal (Financial Scenario) should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderers must fill-in the following Price schedule table and present a detailed breakdown of the price offered.

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

Tenderers should not disclose their financial offer in any part of their tender (technical proposal, cover letter) other than the sealed envelope C.

Price schedule table

1)	Names / positions of the Experts /Service	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 meetings in Cedefop premises - see point 2.8	Number of meetings/person	Price (EUR) per meeting/person	Amount (EUR) for all meetings
				.
	2b) All estimated travel, accommodation, etc. expenses related to performance of the tasks - see point 2.8	Number of persons	Price (EUR) per person	Amount (EUR) for travel, accommodation, etc.
	2c) Other administrative expenses including professional proof-reading and editing in English of final report – see point 2.7	Number of Units (if applicable)	Unit price (EUR) (if applicable)	Amount (EUR) for other administrative expenses
Subtotal 2 (2a+2b+2c)				
3)	Total Price (Total Financial Offer TFO)= 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.

Please note that Cedefop estimates for quantities are indicative and do not constitute any kind of legal obligation for the Centre.

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 version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.
- a read access secured CD containing the submitted in paper form technical proposal.

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 a separate file in *.pdf format)

ANNEX B

Draft Contract

(Given as a separate file in *.pdf format)

ANNEX C

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

(Given as a separate file in *.doc format)

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 (group leader in case of consortium, with indication of entity, 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 (group leader in case of consortium, with indication of entity, name and function), but not by subcontractors.

PLEASE NOTE:

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

ANNEX F

Check list of mandatory documents

(Given as a separate file in *.doc format)

ANNEX G

Questionnaires 1-4

(Given as a separate file in *.doc format)

ANNEX H

“Cedefop Style Manual” version July 2013

(Given as a separate file in *.pdf format)

ANNEX I

Models of power of attorney

(Given as a separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as a separate file in *.doc format)