



EUROPEAN COMMISSION
DIRECTORATE GENERAL FOR RESEARCH & INNOVATION

Directorate B - European Research Area
Unit B2 - Skills

Brussels,
RTD B2/SH/

BY E-MAIL WITH ACKNOWLEDGMENT OF RECEIPT

To:

Operational Manager
COFFEY INTERNATIONAL DEVELOPMENT LIMITED
83 1 Northfield Road, Reading Berkshire
RG1 8 AH
United Kingdom

From:

European Commission
Directorate-General for Research and Innovation
Unit B.2-Skills
SDM 03/25

**Subject: Request for services based on Framework Contract RTD-L05-2010-
Impact Assessment**

The European Commission, Directorate-General for Research and Innovation requests your services in the context of Framework Contract **RTD-L05-2010-Impact Assessment** related to the Evaluation of the EURAXESS project (2008-2012).

I.1 Legal Bases

This action is foreseen in People Working Programme 2012 point 4.3.3:

4.1.3. EURAXESS evaluation study:

In the context of the Communication "Better Careers and More Mobility – A European Partnership for Researchers"⁷² and the 'Innovation Union Commitments', a EURAXESS evaluation study is foreseen, to be implemented under a framework contract with specific contracts of one year duration. This study will combine two aspects: an assessment of the overall progress achieved after the re-branding and regrouping of EURAXESS activities in 2008 (with a focus on the EURAXESS Services Network), and an evaluation of the impact of the functioning of EURAXESS Links in the US, Japan, and China on the networking of European researchers.

Indicative budget EUR 300 000⁷³

Funding Scheme: Coordination and Support Action - public procurement. One specific contract. Procedures normally to be conducted in the first half of 2012.

I.2 General Aim of the Programme

Contractor shall provide a report based on two main evaluation areas:

Part 1 EURAXESS Jobs and Services

Five years after the first study "Evaluation of Communication and Information activities relative to ERA-MORE and the European Researcher's Mobility Portal", the Contractor will assess the overall progress achieved, the level of awareness among the researchers' community as well as the type and extent of assistance requested by the researcher's community.

Part 2 EURAXESS Links

The Contractor will assess the impact of EURAXESS Links in 3 of the above mentioned EURAXESS Links destinations (US, Japan, China).

II. Technical Specifications:

ACTIVITIES TO BE CARRIED OUT BY THE CONTRACTOR

1. Background

In 2007 the European Commission commissioned a study to assess the visibility of the ERA-MORE network (the former name of the EURAXESS project) and the European Researcher's Mobility Portal. The 2007 study clearly indicated a need for a communication strategy and suggested a rebranding of the activities¹.

Following this study, the different activities were re-branded and put under one umbrella – the EURAXESS – Researchers in Motion initiative.

¹ Deloitte and The Evaluation Partnership Limited (TEP), Final report on the Feasibility study on the geographic expansion of EURAXESS-Links Abroad (ELA), specific Agreement No RTD/Dir C/C4/2008/0227619, implementing the Framework Contract RTD-CS-2005-I&C for the Assessment of the Impact of Information and Communication Policy Products, Lot 4 available at http://ec.europa.eu/euraxess/links/about_en.htm

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EURAXESS is a unique initiative providing access to a complete range of information and support services for European and non-European researchers wishing to pursue research careers in Europe. EURAXESS offers access to the job market; assists researchers in advancing their careers in another European country and supports scientific organisations in their search for outstanding research talent.

With the aim of contributing to the development of the European Research Area (ERA) and thus an open and attractive labour market for researchers, EURAXESS-Researchers in Motion provides support to mobile researchers seeking to advance their careers and personal development by moving to other countries.

The EURAXESS activities are a key instrument in implementing the European policy agenda for researchers and play a pivotal role in the Innovation Union's commitments No 1, 4 and 30².

It consists of four main activities:

"EURAXESS Jobs": Access to the job market;

"EURAXESS Services": Access to services regarding daily issues, provided by the Service Centres;

"EURAXESS Rights": Rights and obligations in the research profession;

"EURAXESS Links": Links for European researchers abroad³.

EURAXESS is supported by currently 40 participating countries⁴ across Europe and several EURAXESS Links destinations in overseas (USA, Japan, China, India and Singapore; some more are in the pipeline⁵). Through its portal, EURAXESS Services provides a single access point to information across all countries and personalised assistance by around 500 staff working in the over 200 Services Centres.

2. Objectives

² http://ec.europa.eu/research/innovation-union/index_en.cfm

³ The network is already running in the USA since 2006 and has been launched in Japan in June 2008 and in China in December 2009. The Network was further expanded to India and Singapore in 2010. The members of the network are informed about European Union research policies and made aware of career opportunities in Europe as well as opportunities for collaboration with Europe.

⁴ Albania, Austria, Belgium, Bulgaria, Bosnia and Herzegovina, Switzerland, Cyprus, Czech Republic, Denmark, Estonia, Finland, Faeroe Islands, France, FYRO Macedonia, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Latvia, Lithuania, Luxembourg, Moldavia, Montenegro, Malta, the Netherlands, Norway, Poland, Portugal, Romania, Republic of Serbia, Slovenia, Sweden, Slovakia, Spain, Turkey, the United Kingdom.

⁵ In the period 2013-2015 the EURAXESS links initiative will be expanded to Brazil (2013) to a North-American Hub (covering the USA and Canada) and to an ASEAN hub (covering Singapore plus up to five ASEAN countries). A "hub" is a model where the services of EURAXESS-Links are extended to more than one country within the same geographic area but are generally managed from one single country (USA and Singapore) animating a virtual regional network.

The general objective of the study is twofold: the first objective is to assess the overall progress achieved after the re-branding and regrouping of EURAXESS Services and Jobs activities in 2008, the second is an evaluation of the impact of EURAXESS Links in the US, Japan and China on the networking of European Researchers.

3. Tasks

To achieve the objectives in compliance with the Framework Contract the Contractor shall provide a report based on two evaluation areas:

3.1: Part 1 - EURAXESS Jobs and Services

Five years after the first study "Evaluation of Communication and Information activities relative to ERA-MORE and the European Researcher's Mobility Portal", the Contractor is requested to assess the overall progress achieved, the level of awareness among the researchers community as well as the type and extent of assistance requested by the researcher's community.

The following evaluation questions (non-exhaustive list) should be tackled by the contractor concerning the researcher's community:

- To which extent is the researchers' community aware of the existence of the EURAXESS tools for finding job and funding opportunities (EURAXESS Jobs) as well as practical support for issues related to the mobility of researchers (EURAXESS Services)?
- To what extent does the researchers' community make use of the services and support provided by EURAXESS?

The following evaluation questions (non-exhaustive list) should be addressed to the Services Centres and the stakeholders' community:

- To what extent have the 6 main recommendations (Approach and Strategy, Challenges and Risks, Awareness, Branding, Effectiveness of information and communication activities, Role of the European Commission and participating countries) from the 2007 study on ERA-MORE network and the European Researcher's Mobility Portal been implemented?
- What are the main problems and the main barriers hindering the full implementation of the recommendations?
- Overall, to which extent has the objective of a coordinated, strategic and long term approach to better communication of the activity been a success?

In addition the Contractor should also identify examples of good practice concerning the new features introduced since 2008. This should cover features introduced by the Commission as well as by all or individual EURAXESS service centres to provide

incoming mobile researchers with a personalised service to resolve practical problems, provide free language courses, etc.

- Have the national portals included information in matters as visa requirements, work permits, social security and pension rights? Are they user friendly?
- In particular, do the national portals provide updated information to researchers in different countries?
- Which type of trainings have the EURAXESS members followed in the last 12 months?
- What training needs have been identified by the members? What are the needs to do trainings since 2008?
- Are there information/seminars and updates on experiences and good practices? If yes, how often? And at which level (national, regional etc.)?
- Is there coordination of the Services Centres within countries? Identify which type and describe the coordination procedure.

Finally the Contractor should also elaborate a set of recommendations for further improvement.

The contractor shall carry out desk research and surveys covering all EURAXESS member countries, as well as additional field work in 10 EURAXESS member countries (Austria, Bulgaria, Croatia, Czech Republic, Italy, Netherlands, Norway, Poland, Spain and UK)⁶ and a series of focus groups.

More specifically the fieldwork activities will consist of:

- 10 focus groups organised in 10 countries (1 per country) sampled for the study;
- Interviews with key EU level stakeholders (2/3 per country⁷);
- Face to face interviews with a selection of stakeholders at country level (within the 10 selected countries)
- Interviews with representatives of the Voice of the Researchers⁸;
- A web-based survey; the Contractor shall guarantee at least 500 replies that will be representative of the population of researchers in these countries taking into account differences in gender and stages of their careers⁹

3.2: Part 2 - EURAXESS Links

⁶ The list of countries may be subject to change

⁷ The final list of organisation will be agreed during the kick-off meeting and cannot exceed 300 organisations.

⁸ Is a new initiative launched by the Commission in April 2012 in order to open up new communication channels between the Commission and the researchers across Europe and to provide new opportunities for systematic, direct interaction between representatives of researchers and the policy-making process at EU level.

⁹ The sample will be agreed during the kick off meeting.

The second part of the study shall assess the impact of EURAXESS Links in 3 of the above mentioned EURAXESS Links destinations (USA, Japan and China).

The evaluation questions (non-exhaustive list) shall be adapted to assess the impact of EURAXESS Links in each respective country.

- How many members are there and how many participate actively? What services were offered? To what extent do the services offered meet the needs of members? What feedback has been received from the members?
- To what extent are the members of the network informed about European Union research policies and made aware of career opportunities in Europe as well as opportunities for collaboration with Europe? How was this achieved?
- Overall, to what extent has EURAXESS Links been successful in linking European researchers with the European research base and stimulating scientific cooperation between Europe and the host countries where they work? To what extent this initiative has been helpful in creating synergy among researchers and finding new job opportunities?
- Are there examples of good practice? What problems have been encountered in trying to meet the objectives? What improvements could be made?

The Contractor shall take account of the results (to be provided by the Commission) of the forthcoming MORE2¹⁰ survey of researchers in non-EU countries, which includes the 3 LINKS destinations. By way of example, all researchers in the survey will be asked if they are aware of EURAXESS and if they have used it.

Finally the Contractor should also elaborate a set of recommendations to improve the services offered by each of the EURAXESS Links hubs.

4. Deadline for submission of an offer

According to Article I.4 to the Framework Contract, within **10 working days** of a request for services being sent by the Commission to the Contractor, the Commission shall receive an estimate of the resources to be allocated for its execution, with particulars in support.

5. Deliverables/Reports

¹⁰ The survey will be provided by the European Commission as soon as it is available.

A **kick-off meeting** between the contractor and the Commission services further to the signature of the contract will be organised as soon as possible.

The contractor shall submit a **progress report (inception report)**, an **interim report** and a **final report**. After execution of the tasks, the contractor will submit a **Technical Final Report** according to article 7.1.1 of the Framework Service Contract Annex I (Technical Specifications).

D1. An inception report (minimum 5 pages) in English shall be submitted in PDF compatible versions to RTD SKILLS PUBLIC PROCUREMENT

three weeks after the kick-off meeting. The Commission will have 5 working days to approve, request changes or reject the progress report. On receipt of comments, the contractor will have 5 working days in which to submit additional information or a new progress report.

D2. An interim report (between 10 and 15 pages) in English shall be submitted in PDF compatible versions to RTD SKILLS PUBLIC PROCUREMENT

three months after the kick-off meeting (ref. point 6). The interim report shall indicate the progress to date and sufficient information to allow reorientation if required, and will contain at least the following information:

- The results obtained and a comparison with the objectives as defined by the service request;
- Information on the remaining work to be carried out;
- Any particular problems encountered that would have an effect on the tasks to be performed;
- Information and clear references on sources of information used or to be used;
- Clear indications and detailed planning of the work to be carried out during the rest of the period for the completion of the tasks.

The Commission shall have 10 working days to approve, request changes or reject the report. On receipt of comments, the contractor will have 10 working days in which to submit additional information or a new interim report.

D3. A final report (approximately 50 pages plus annexes) in English in a form and quality suitable for publication shall be submitted in PDF compatible versions to RTD SKILLS PUBLIC PROCUREMENT

six months after the signature of the contract. The Commission shall have 10 working days to approve, request changes or reject the report. On receipt of comments, the contractor will have 10 working days in which to submit additional information or a new final report. The core text of the final report, to be written in English, should be prefaced by a 5-10 page executive summary.

D4. A Final Technical Report shall be submitted in PDF compatible versions to RTD SKILLS PUBLIC PROCUREMENT

in accordance to article 7.1.1 of the Framework Contract

Annex I (Technical Specification) within 30 calendar days after acceptance of deliverable D3 and no later than 30 calendar days after the end of the Contract. The Technical final report will be deemed to have been accepted by the Commission if, within 45 calendar days of receipt of this report, the Commission has not expressly informed the Contractor of any comments. The *Final Technical Report* shall be presented in accordance to Annex VIII to the Technical Specification of the Framework Service Contract.

6. Duration of tasks

The duration of the tasks shall not exceed six months. Execution of the tasks shall start from the date of entry into force of the specific contract.

7. Planning and follow-up meetings

Planning and follow-up meetings between the Contractor and the Commission will be held at the Commission's office in Brussels.

These meetings will be held approximately every three months and will monitor the progress of the work and compliance with the procedures and with the quality criteria.

The Contractor with the Commission will meet up approximately 3-4 times over the duration of this agreement: indicatively, a kick-off meeting around 1 week after the signature of the contract, a meeting after 3 months upon delivery of the interim report (D2) and a final meeting upon delivery of the draft final report (D3).

8. Missions

Focus groups (to be decided with the Commission) with researchers and face-to face interviews with a selection of stakeholders at country level should not exceed three working days for Part 1, five working days for Part 2.

III. Price

The contractor should send an offer in compliance to Framework Contract **RTD-L05-2010-Impact Assessment, Annexes II and IV.**

The European Commission has estimated that the total price of the services (including travel and subsistence expenses) shall be between 250.000,00 € (two hundred fifty thousand euros) and 300.000, 00 € (three hundred thousand euros). A Tender with a total price exceeding 300.000,00 € (three hundred thousand euros) will be rejected.

The budgetary distribution shall be indicatively two thirds of the budget to Part 1, and the remaining third to Part 2 (see point 3).

Prices must be fixed amounts which are not subject to revision and which include all charges (including travel and subsistence). Estimated travel and subsistence expenses considered necessary by the tenderer in order to carry out the study must also be indicated separately.

Prices should be quoted free of all duties, taxes and other charges, i.e. also free of VAT, as the European Union (EU) is exempt from such charges under articles 3 and 4 of the Protocol on the Privileges and Immunities¹; the amount of VAT should nonetheless be shown separately.

IV. Payments

Payments under the Contract shall be made in accordance with Article II.4 and II.5 of the general conditions of the Framework contract. Payments shall be executed only if the Contractor has fulfilled all his contractual obligations by the date on which the invoice is submitted.

No pre-financing will be made under this contract.

IV. Procedure

Public Procurement, use of a Framework Service contract without reopening of competition.

RTD B2 Public Procurement

