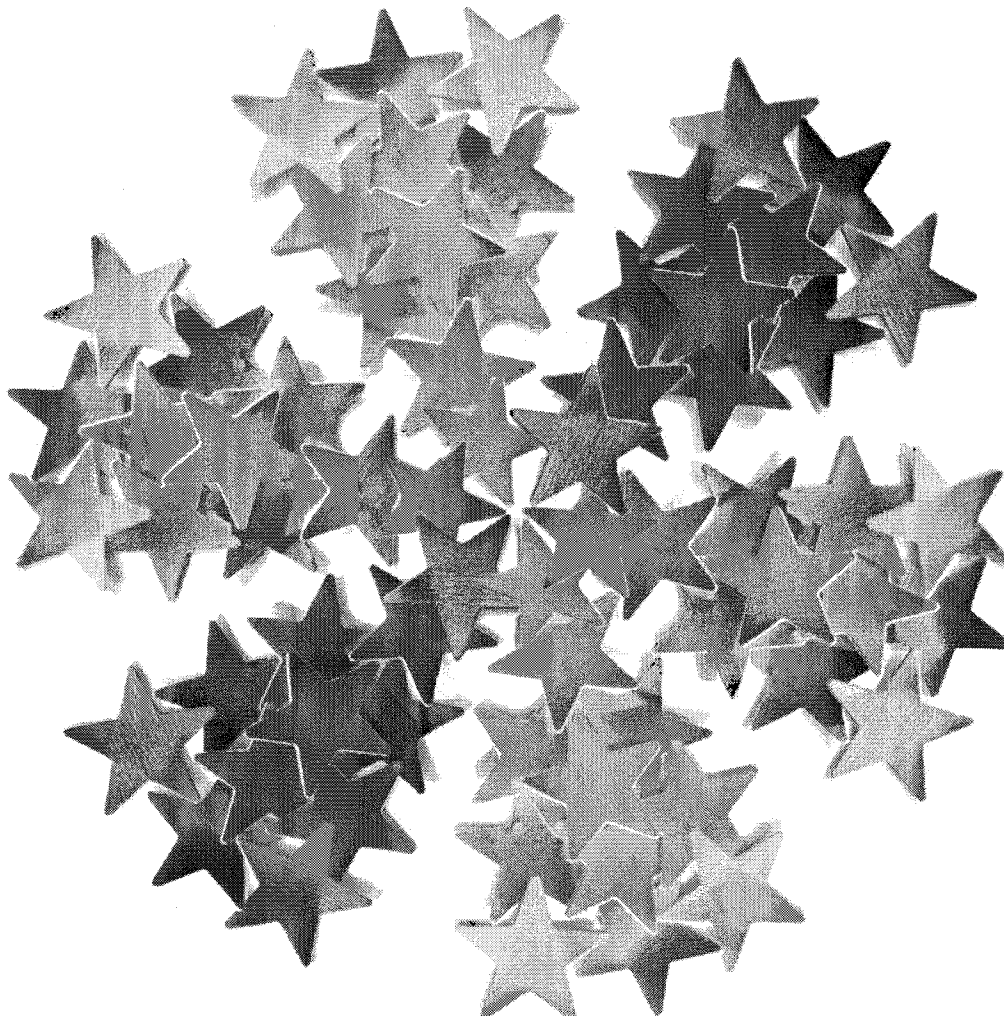


the evaluation partnership 

Deloitte.



REQUEST FOR SERVICES

to the European Commission
Directorate General for Research & Innovation
Unit B2-Skills

Geographical expansion of the EURAXESS-Links Network

26 August 2013

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1 Introduction

The Evaluation Partnership and Deloitte are submitting this proposal to provide services under the Framework Contract RTD-L05-2010-Impact Assessment. This proposal is submitted in response to a request for services from Directorate General for Research and Innovation (DG RTD), Unit B2-Skills in line with the specifications outlined in the Terms of Reference for the work to be conducted.

The purpose of this assignment is to *perform a background research related to the geographical expansion of the EURAXESS-Links Network*.

The proposed approach is based upon the methodologies, fee rates and contractual requirements described in the Framework Contract RTD-L05-2010-Impact Assessment.

In detail, this proposal provides an overview of the context, a detailed approach and methodology that TEP and Deloitte recommend for the assignment. The document is structured as follows:

- **Context:** provides a short description of the EURAXESS-Links context;
- **Understanding of the assignment:** summarises the key requirements for this assignment as described in the Terms of Reference from DG RTD;
- **Approach and work plan:** shows the specific activities that will be carried out by the team and the amount of time and budget that would be required;
- **Budget:** provides a financial breakdown and summary of the costs that will be required to carry out the assignment;
- **Proposed team:** describes the team that has been put together to work on this assignment and gives insight into the skills and experience of different team members; and
- **Quality assurance:** provides information about the way that TEP and Deloitte will ensure that the work undertaken and the resulting deliverables are to the highest standards, as well as TEP and Deloitte's recommended approach to communication with the client.

TEP and Deloitte declare that they are able to carry out the services described in this proposal and to deliver the related deliverables on or before the dates specified.

2 Background

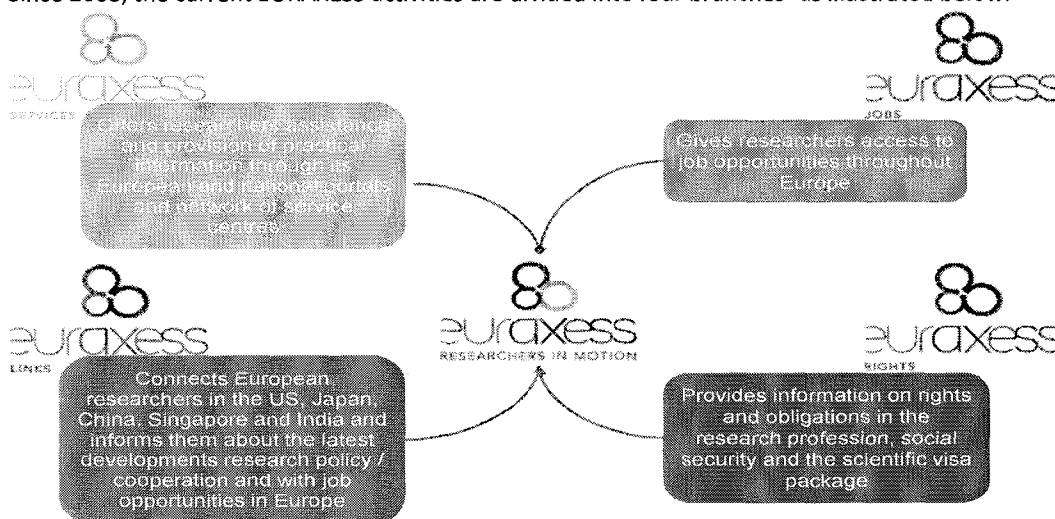
2.1 EURAXESS – Researchers in Motion initiative at a glance

Following its Communication, "Towards a European Research Area"¹, of 18th January 2000 the Commission emphasised the need for more abundant and mobile human resources in research. **Mobility** was perceived as one of the major instruments to enhance the transfer of knowledge and to boost the European Union's attractiveness for research talent from all over the world. The Lisbon European Council of 22nd and 23rd March 2000 invited the Commission, in close collaboration with the Member States, to take the necessary steps to **remove the obstacles to mobility by 2002**. In order to respond to the Lisbon mandate, the Commission adopted on 20th June 2001 the communication "A Mobility Strategy for the European Research Area"² aiming to create favourable environment of the mobility of researchers.

As a part of the concrete measures foreseen to improve the overall environment of researchers in Europe, it was proposed to set up an **internet portal** linking national and Commission internet sites by providing a common entry point for researchers to national and community level information. Furthermore, **national internet sites** were proposed providing to EU and foreign researchers practical information on national legislation and procedures and listing job vacancies and funding opportunities. The creation of **national Mobility Centres** was also proposed in order to assist foreign researchers in dealing with legal and administrative matters and provide practical information on accommodation, day care or education for children and give advice on job opportunities for the accompanying partner.

The European Researcher's Mobility Portal (now called EURAXESS Jobs Portal) was launched in June 2003. It was followed, in June 2004, by the launch of the ERA-MORE Network of Mobility Centres (now called EURAXESS Services Network). Two years later, in 2006, the EURAXESS Links Abroad - ELA (now called EURAXESS Links Network) was established with the primary objective to connect all European researchers working outside Europe so that they remain in close collaboration with their colleagues. The Network could also play an important role as an 'open door' for those international researchers interested in moving to Europe to carry out research activities.

Since 2008, the current EURAXESS activities are divided into four branches³ as illustrated below:



¹ COM(2000) 6 Final *Towards a European Research Area*

² COM (2001) 331 Final *A Mobility Strategy for the European Research Area*

³ European Commission, EURAXESS, Retrieved from <http://ec.europa.eu/euraxess/index.cfm>

2.2 EURAXESS-Links Network

Within the EU2020 Strategy, Innovation Union Commitment #30 foresees that by 2012, the European Union and its Member States should put into place integrated policies to ensure that leading academics, researchers and innovators reside and work in Europe and to attract a sufficient number of highly skilled third-country nationals to Europe. 'Horizon 2020' is the financial instrument of EUR 80 billion over the period 2014-2020 to implement the Innovation Union. It is also the driving force to complete and further develop the European Research Area by 2014 aiming to create a genuine single market for knowledge, research and innovation in Europe.

As stated in the Terms of Reference, *the vision for EURAXESS Links is to become a global community for European and non-European researchers outside Europe for information and networking purposes.*

With the overarching aiming to promote mobility and career development for European researchers (and as of 2013, for non-European researchers as well), EURAXESS-Links has experienced geographical expansions in two phases so as to follow researchers' mobility patterns all over the globe. The following two sub-sections concisely described these two phases.

2.2.1 EURAXESS-Links Phase 1

Three feasibility studies were carried out prior to the launch of EURAXESS Links in the USA, Japan and China (respectively in 2005, 2007 and 2008).

As a result, the first EURAXESS Link (ERA-Link at that time) was successfully launched in the United States in 2008 in order to connect European researchers in the US to the broader network of European researchers. Later, Japan (in 2008) and China (in 2009) were added to connect both research communities to their counterparts in Europe.

The EURAXESS Links have been operated under a Framework Contract and animated by one Information Officer (IO) per country (Link) who was responsible for running the local website (only with the support of the contractor) and attending fairs promoting "doing research in Europe".

In 2008, the Commission commissioned Deloitte and TEP with a feasibility study on ELA Geographic Expansion to establish recommendations for the new series of countries/regions on the next generation of ELA candidates to be assessed and on the various models of its structure and management in the future. The main objective of this study was to collect and analyse useful data in order to recommend in which countries next ELA networks should be established, whether ELA networks should be created country by country or using a "hub" approach and which management models could be envisaged to run the networks.

A double expansion of the EURAXESS Links Network came true in 2010 in two more countries, India and Singapore, given their important contribution to research and novelty production, thus arriving in 2012 at the end of EURAXESS Links phase 1.

2.2.2 EURAXESS-Links Phase 2

Since 2013, a new era for the EURAXESS Links was initiated and a whole new structure has been put in place, under a new Framework Service Contract (signed at DG RTD.B), to support the animation of the project during the period 2013-2015. In terms of management and governance model, a central structure has been set up to coordinate actions of 14 IOs in all geographical areas covered, including Brazil⁴ (to be launched in early 2013), and two hubs⁵ (a North-American and an ASEAN one, both rooted on the existing EURAXESS Links Networks in the USA and Singapore)⁶.

⁴ Given the geographic position of the country, its large economical and environmental spectrum as well as due to the fact that no concrete initiatives targeting European researchers exist in the country so far.

Nowadays, the IOs have multiple tasks, are in charge of organising four events per year so as to improve visibility and training sessions will be held in Brussels twice per year to train the information officers and increase their awareness and understanding of the assignment.

In phase 2, the whole international community that may be interested in working and living in Europe has been identified as primary target group for the EURAXESS Links IOs to address their services.

The recent evaluation of the EURAXESS project (2008-2012), carried out by Deloitte and TEP, draw concrete conclusions and recommendation in relation to the *impact of EURAXESS Links in the US, Japan and China on the networking of European researchers*. All in all, it was concluded that:

- Despite the fact that EURAXESS Links responds to most of researchers' needs in the US, Japan and China, there is no mechanism to ensure this is done in a systematic way, thus putting the continued relevance of the initiative at risk;
- Awareness of EURAXESS Link is varied according to the perceived needs as well as the geographical size of the country;
- EURAXESS Links is a key source of information for researchers especially in the US to keep abreast of European research policy and opportunities for careers and collaboration with Europe whereas researchers in China and Japan use EURAXESS Links to identify funding and other opportunities leading to further work and projects in the country in question;
- The impacts of EURAXESS Links are hard to discern and measure but overall, it has played an indirect, contributory role in propelling the careers of some researchers on an individual basis, and fostering dialogue among relevant institutions and organisations;
- There were several barriers identified during the period 2008-2012 such as the level of engagement with national-level institutions in the EURAXESS Links countries, the approach to monitoring and evaluation, cooperation with other researcher assistance interventions and the longer term strategy of EURAXESS Links;
- There is a high level of collaboration between the IO and EU Delegation.

2.2.3 EURAXESS-Links Phase 3

As the EC constantly states "researchers trained both in Europe and in third countries, or linked through networks, will become ambassadors for international cooperation"⁷. Taking into account the great number of European researchers working and carrying out research activities abroad, the European Commission decided to build additional international networks which will serve as *important reference for EU and non-EU researchers abroad, giving them information on opportunities in Europe and assisting them when relocating to Europe* (as stated in the Terms of Reference).

The added value of expanding the EURAXESS-Links Network to additional third-countries is to become the 'knowledge bridge' between Europe and the network country, thus enhancing the exchange of knowledge and information, guarantying an up-to-date interpretation of the research trends on the ground and sustaining and nurturing the relation of EU and no-EU researchers to the European research market.

⁵ Tender Specifications, Support for the animation, information, organization of events and communication services of the EURAXESS Links Network, Invitation to tender N° RTD/2012-EURAXESS-Links/B2, Skills, Open recruitment: Framework Service Contract, March 2012.

⁶ The objective is to bring together researchers working in more than one countries belonging to the same geographic area.

⁷ Communication from the Commission to the Council and the European Parliament, A Strategic European Framework for International Science and Technology Cooperation, COM (2008) 588 final, Brussels, 24.09.2008.

In addition, the close collaboration in research projects between EU Member States and a third country will be also well promoted since the network allows participants to often have gatherings, exchange views and cooperate on the global research landscape.

Finally, EURAXESS Links network gives the opportunity to foreign researchers to explore the European research community and eventually, be attracted to live and work in Europe while, at the same time, in emerging economies, the network could leverage scientific advantages for the country itself as well as reinforce the development of strategic collaborations in the research sector.

Taking into consideration the scarce financial and human resources, it is not feasible to launch a EURAXESS Link in each country of the world. Consequently, there is a need to develop a strategic approach and identify where and why a EURAXESS Link should be launched next.

The current study aims to produce robust conclusions on the next generation of EURAXESS Links candidates (phase 3).

3 Understanding of the objectives of the assignment

DG Research and Innovation would like to conduct a background research study on EURAXESS-Links geographical expansion to establish recommendations for the new series of countries on the next generation of EURAXESS Links candidates to be assessed.

The main objective of this study is to *collect data and identify the exact geographical expansion of EURAXESS Links during the phase 3 of the project (2016-2020)*.

The geographical scope of the study comprises the following **nine countries**, already pre-selected by the Commission: Argentina, Australia, Chile, Mexico, New Zealand, Peru, Russia, South Africa and South Korea.

The study will produce:

(Task 1) a mapping of the Research Community: the exercise will aim to provide the Commission with an overview of the research community, both European and non-European researchers, in each of the country under the scope of this study.

Similar to the feasibility study performed in 2008, the study team will perform a systematic mapping exercise of the size and the basic characteristics of the research community in the nine pre-selected countries.

As stated in the Terms of Reference, the major questions to be explored are:

1. How many EU and non-EU researchers are located in the country;
2. The evolution of the researcher's population over the last five years
3. Their career stage⁸;
4. The place of work, private of public sector; and
5. Their research field.

In addition, the perceived needs of the local research community in the countries in question as well as any key expectations/problems related to the mandate of EURAXESS will be reported.

On the one hand, the study team will perform **an analysis of relevant sources of information** on the Internet, to the extent to which information is available online. On the other hand, the study team will seek information through the phone interviews with EC Delegations and relevant stakeholders identified⁹.

(Task 2) a mapping of the collaborations: the exercise will aim to provide an overview of the research collaborations between the selected countries and the EU and its Member States. Simultaneously with the mapping exercise of the research community in the nine pre-selected countries, the study team will carry out a mapping exercise with regard to the existing collaborations between these countries and the European institutions as well as the Member States.

⁸ In accordance with the new European Framework for Research Careers (2011), the current research career stages are divided in four broad research profiles:

- R1: First Stage Researcher (up to the point of PhD);
- R2: Recognised Researcher (PhD holders or equivalent who are not yet fully independent);
- R3: Established Researcher (researchers who have developed a level of independence);
- R4: Leading Researcher (researchers leading their research area or field).

⁹ The collection of quantitative data on the research community will be subject to availability. When data will not be available, the study team will seek to feed the mapping exercise with assumption-based estimation to be collected through the interviews.

The purpose of this exercise is twofold: first, to identify and map existing synergies between the nine countries and the European institutions as well as the Member States and second, to discover new areas for possible actions and further cooperation.

(Task 3) Identify the policy strategies: the exercise will provide an overview of the policy strategies both within the European Institutions and the Members States targeting the selected countries.

(Task 4) Analyse, report and design a roadmap: the study team will produce nine country reports presenting the results of tasks 1, 2 and 3 and will develop a roadmap for the expansion the network. In order to provide the Commission with clear recommendations, the study team will develop a series of criteria that could be used to prioritise the potential expansion (maturity of the research strategy policy, current agreements, current level of cooperation, etc.).

TEP and Deloitte will develop a set of country analyses as well as a roadmap for the geographic expansion during the period 2016-2020.

4 Approach and work plan

This section describes the methodology that will be used to conduct the study in question.

4.1 Principles

The key principle of our approach is built around cross-referencing the following features:

- a clear understanding of the work to be performed in order to tailor our approach to the evaluation requirements (see previous sections “background” and “understanding of the objectives of the assignment”);
- a comprehensive and tailored methodological approach for gathering and analysing data (and/or proxies or assumption-based estimations when data not available) to ensure a strong base of evidence and coverage of all tasks specified in the Terms of Reference (see next sub-sections);
- an open attitude towards stakeholders who want to contribute proactively (EC officials, EURAXESS Services Centres staff, EURAXESS Links Information Officers, etc.).

We are confident that this approach will enable us to meet the challenge of the strict time schedule whilst maximising the input of the different stakeholders.

4.2 Detailed approach

Our project plan to perform the study encompasses three key phases:

- Phase 1: Inception;
- Phase 2: Data Gathering (Tasks 1, 2 and 3);
- Phase 3: Analysis, reporting and roadmap (Task 4).

The figure below illustrates the suggested approach and unfolds the different tasks.

	Phase 1	Phase 2 (Tasks 1, 2 and 3)			Phase 3 (Task 4)
Objectives	Fine-tuning of the planning and methodology	Mapping of the Research Community	Mapping of the collaborations	Identification of policy strategy	Analysis, Reporting and Roadmap
Expected outcomes	<ul style="list-style-type: none">• In-depth understanding of the context, objectives and expected outcomes of the study• Collection of any relevant document• Detailed final planning	<ul style="list-style-type: none">• Researchers• Evolution of researchers' population• Career stage• Private or public sector• Key expectations/needs	<ul style="list-style-type: none">• Collaborations with EU and/or Member States (+ identification of the actors involved in collaborative research projects)• Potential synergies, new areas for actions and future cooperation	<ul style="list-style-type: none">• EU policy strategies• Member States policy strategies	<ul style="list-style-type: none">• Country reports• Road-map
Methodology	<ul style="list-style-type: none">• Initial desk research• Preparatory meeting	<ul style="list-style-type: none">• Extensive desk research<ul style="list-style-type: none">• Websites (DG RTD, EEAS, EU Delegations, target country ministries in charge of S&T, Research and Innovation)• Online databases (ERAWATCH, EUROSTAT, OECD, UN)• Any relevant data, report, etc. collected through research and interviews (such as policy documents, studies, etc.)• Face-to-face or phone interviews with (but not limited to):<ul style="list-style-type: none">• EU officials (international cooperation)• EU Delegations in target countries (S&T counsellor where applicable)• Target country Embassies to the EU• Member State Embassies in target countries• Relevant stakeholders involved in research projects with target countries			<ul style="list-style-type: none">• Analysis• Reporting• Workshop
Project Management	Manage Project and Communications				

Deloitte and TEP have appointed a Project Manager who will be the main point of contact for the Commission throughout the project. The Project Manager will report progress to the Commission on an on-going basis via telephone and e-mail. In addition, two reports will be produced. The first report (Interim report) will give an overview and progress of the execution of the study, presenting any unforeseen limitations or constraints to the collection and analysis of the data, which may require to review/fine-tune the methodology. The second report (Final report) will present the main findings and provide detailed conclusions and roadmap for the expansion to DG RTD – Unit B2.

A first meeting will be held with the Commission team to discuss the detailed planning of the project and two more meeting will be organised following the submission of each report to discuss the outcomes of each stage of the project.

Combined with our management approach (see next chapter), our project plan will allow us monitoring the different tasks to respect the scheduling of the study. Regular meeting between the study team and the Commission officials responsible for this project could be organised to discuss issues and brainstorm, when deemed as relevant and necessary.

4.3 Phase 1 – Inception phase

Phase 1 will allow the study team to fine-tune the planning and the methodology. This phase will frame the study to ensure sound and robust results.

The first phase comprises three steps:

1. Phase 1 - Inception	
1.1.	Preparation of the draft detailed planning
1.2.	Preparatory meeting on planning
1.3.	Final detailed planning

4.3.1 Preparation of the draft detailed planning

Upon signature of the contract the study team will start fine-tuning the project planning. The planning and methodology will be validated by the Commission during a first meeting two weeks after the signature of the contract. The draft detailed planning will be made available to the Commission at least two days before the foreseen meeting and will include:

- Detailed description of tasks to be performed;
- Detailed description of deliverables to be produced;
- Meetings with the Commission; and
- Set deadlines.

4.3.2 Preparatory meeting on planning

As stated in the Terms of Reference, a **one day preparatory meeting** with the Commission to discuss the detailed planning of the project will take place within two weeks from the signature of the contract.

The preparatory meeting will provide a good setting to start the project, present and discuss the work plan with the Steering Group and transfer to the study team all the available information and/or documents that could be relevant to the process. We will further seek in this meeting to:

- Meet the Commission Officials responsible for the study;
- Clarify the objectives and the scope of the study;
- Discuss in detail the work plan;
- Present and validate the data collection tools (interview guides).

We will also take the opportunity to schedule a number of preliminary interviews with members of the steering group.

4.3.3 Final detailed planning

Following the preparatory meeting, the final version of the planning will be delivered to the Commission (one week after the meeting), and will integrate the relevant comments and opinions gathered during the meeting.

4.4 Phase 2 – Data gathering

The second phase will entail the data gathering activities for Tasks 1, 2 and 3.

Phase 2 will consists of nine steps, two deliverables and one meeting as illustrated below. However, the three sub-tasks described under each tasks will, to the extent possible, be carried out simultaneously.

2. Phase 2 – Data gathering	
Mapping Exercise of the Research Community (Task 1)	
2.1.	Desk Research
2.2.	Phone interviews with relevant stakeholders
2.3.	Reporting
Mapping Exercise of the collaborations (Task 2)	
2.4.	Desk Research
2.5.	Phone interviews with relevant stakeholders
2.6.	Reporting
Identification of policy strategy (Task 3)	
2.7.	Desk Research
2.8.	Face-to-face or phone interviews with EU officials and representatives of MS
2.9.	Reporting
Deliverables	
2.10	Draft Interim report
2.11	Interim report meeting
2.12	Interim report (finalised)

4.4.1 Desk research (sub-tasks 2.1., 2.4. and 2.7.)

Immediately following the preparatory meeting (phase 1) with the Commission, the study team will begin to identify, review and log relevant sources of information, including a review of:

- relevant websites (notably DG RTD, EEAS, EU Delegations, target country ministries in charge of S&T, Research and Innovation);
- international organisations on-line databases (notably ERAWATCH, OECD, UN and Eurostat databases);

- reports and studies concerning the EU scientific diasporas in the various countries, etc.

These sources will be used for in-depth analysis and for increasing the study team's understanding of the research landscape in the countries in question.

More specifically:

- For task 1, the study team will seek to collect relevant data about various aspects of the research community in the target countries (population, fields of research, sector of employment, etc.), its evolution since the last five years, and expectations/problems related to the mandate of EURAXESS. In addition, the study team will attempt to collect qualitative information on EU and non-EU researchers in the nine countries selected.
- For task 2, the study team will look at the bi-lateral scientific agreements that may exist between the target countries and the EU and/or privileged relationships with Member States. The study team will also identify and examine collaborative research projects that may involve the target countries both within the European Institutions and among Member States and Member States initiatives in collaboration with the EC. These sources will be used for outlining the actors involved in collaborative research projects with the target countries.
- For task 3, the study team will review policy documents related to EU and Member States policy strategies within the nine countries.

The desk research will make use of any data made available to the study team providing that the websites and relevant documentation are available in English or in one of the languages mastered by the study team member.

4.4.2 Face-to-face and phone interviews with relevant stakeholders (sub-tasks 2.2., 2.5. and 2.8.)

In parallel with the extensive desk research, a series of telephone interviews and email contacts will be launched by the study team in order to obtain baseline information on the current situation in the sample of nine countries.

As a first step, the study team will contact the EC Delegations in each of the targeted countries to obtain a first insight on the research community in the respective country. The study team will also closely cooperate with the EC Delegations and S&T counsellor (where applicable) in order to identify relevant stakeholders to interview.

Depending on the task and related aspect covered and with the support of the EC Delegations, the study team will seek to organise face-to-face (if Brussels based) and/or phone interviews with a series of stakeholders including (but not limited to):

- EU officials (DG RTD, FPI, DEVCO, etc.) (up to 10 interviews);
- Target country Embassies to the EU (9 interviews);
- Relevant national authorities in the target countries (up to 18 interviews);
- Member State Embassies¹⁰ in target countries (up to 36 interviews);
- Relevant stakeholders involved in research projects with target countries (up to 36 interviews).

The study team will take the opportunity to cover several aspects (research community, collaborations and policy strategies) with the stakeholders presented above. Interview guides will be

¹⁰ Based on the desk research, the study team will identify up to four EU Member States for which there are privileged scientific collaboration established and/or S&T bi-lateral agreements. As an example, the study team will consider France, Germany, Italy and Spain in the case of Argentina.

designed in order to ensure the full coverage of the aspects of tasks 1, 2 and 3 and to avoid contacting several times the stakeholders.

We will conduct the series of face-to-face or phone interviews in English. The list will be set up and finalised at the beginning of phase 2.

4.4.3 Reporting (sub-tasks 2.3., 2.6. and 2.9.)

The study team will collect all relevant information and will report it accordingly. Reporting templates will be designed to ensure comparability of the outcomes of the three mapping exercises for the nine targeted countries. The reported data will feed the country reports that will be produced during Phase 3.

A draft interim report of 10-20 pages will be delivered to the Commission within 10 weeks from the signature of the contract, including an overview of the execution of the project.

As stated in the Terms of Reference, the draft interim report will be made available to the Commission at least two days before a scheduled **half day meeting** to present the execution of the tasks and discuss the progress to date. It 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 source of information used or to be used; and
- 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 interim report will be presented during a Steering Group meeting 12 weeks after the signature of the contract. Once validated, the evaluation team will submit the final version no later than one week after receipt of Commission's comments.

The interim report will be submitted in English.

4.5 Phase 3 – Analysis, reporting and roadmap

The third phase will be dedicated to the in-depth analysis of the data collected for tasks 1, 2 and 3. The analysis will be presented in nine detailed country reports and will feed the identification of criteria and indicators that will be used to prioritise the geographic expansion of the EURAXESS Links.

Phase 3 consists of three steps, two deliverables and one meeting.

3. Phase 3 – Analysis and judging	
Analysis, reporting and roadmap (Task 4)	
3.1.	Country reports
3.2.	Roadmap
3.3.	Workshop on roadmap developed
Deliverables	

3. Phase 3 – Analysis and judging	
3.4.	Draft final report
3.5	Final report meeting
3.6	Final report

4.5.1 Country reports

Based on the finding of the mapping exercises (phase 2), the study team will produce **nine individual country reports**.

The country reports will consist of the following parts:

1. Introduction – a concise description of the science and technology landscape of the country;
2. Quantitative data on the S&T landscape of the country;
3. The level of S&T cooperation with the EC Delegation and EU Member States with the country including the EU and Member State policy strategies;
4. The current situation for EU and non-EU researchers in the country;
5. The added value of a EURAXESS Link in the country;
6. Obstacles and keys to success; and
7. Conclusion.

The template of the country reports will be fine-tuned together with the Commission at the beginning of phase 3.

4.5.2 Roadmap

An extensive and comprehensive analysis of all findings will allow, at this stage, the study team to design a roadmap assessing the opportunity for the geographical expansion of the EURAXESS Links network in the suggested countries which will further serve to draw conclusions and recommendations.

The template of the suggested roadmap will be fine-tuned together with the Commission in the beginning of phase 3.

4.5.3 Workshop on roadmap development

An analysis conducted by the study team of the current situation in the nine countries in question as well as the possibility for setting up a EURAXESS Link in these countries will be presented and discussed in a workshop together with the steering group members.

During this workshop, the study team will present the conclusions per country, the list of criteria and indicators developed to prioritise the countries and the draft roadmap for the geographical expansion of the EURAXESS Links in 2016-2020. Criteria and indicators may cover the following items (to be fine-tuned together with the Commission):

- Landscape of the research community in the country;
- Level and type of collaborations between the European Commission and the country;
- Impact and contribution to research and novelty production in the country;
- Strategic importance of the country in terms of research and innovation policies.

At the end of the workshop, comments and issues will have been highlighted and the roadmap will be, if necessary, reworked.

A draft final report of between 50 and 100 pages will be delivered to the Commission in week 18 of the project, presenting a thorough analysis of the nine pre-selected countries and including a detailed roadmap on the geographical expansion of the EURAXESS Links during the period 2016-2020.

As stated in the Terms of Reference, the draft final report will be made available to the Commission at least seven days before the final report meeting to be held on week 19. The final report will include sound analysis of findings for all nine pre-selected countries, as well as factually based conclusions and roadmap.

The final version of the report will be submitted to the Commission one week after the **one day meeting**, taking into consideration the Commission's final comments.

The final report will be submitted in English.

4.6 Our detailed planning

This section presents the proposed plan of work that will be followed by the project team to meet the objectives set by DG RTD.

