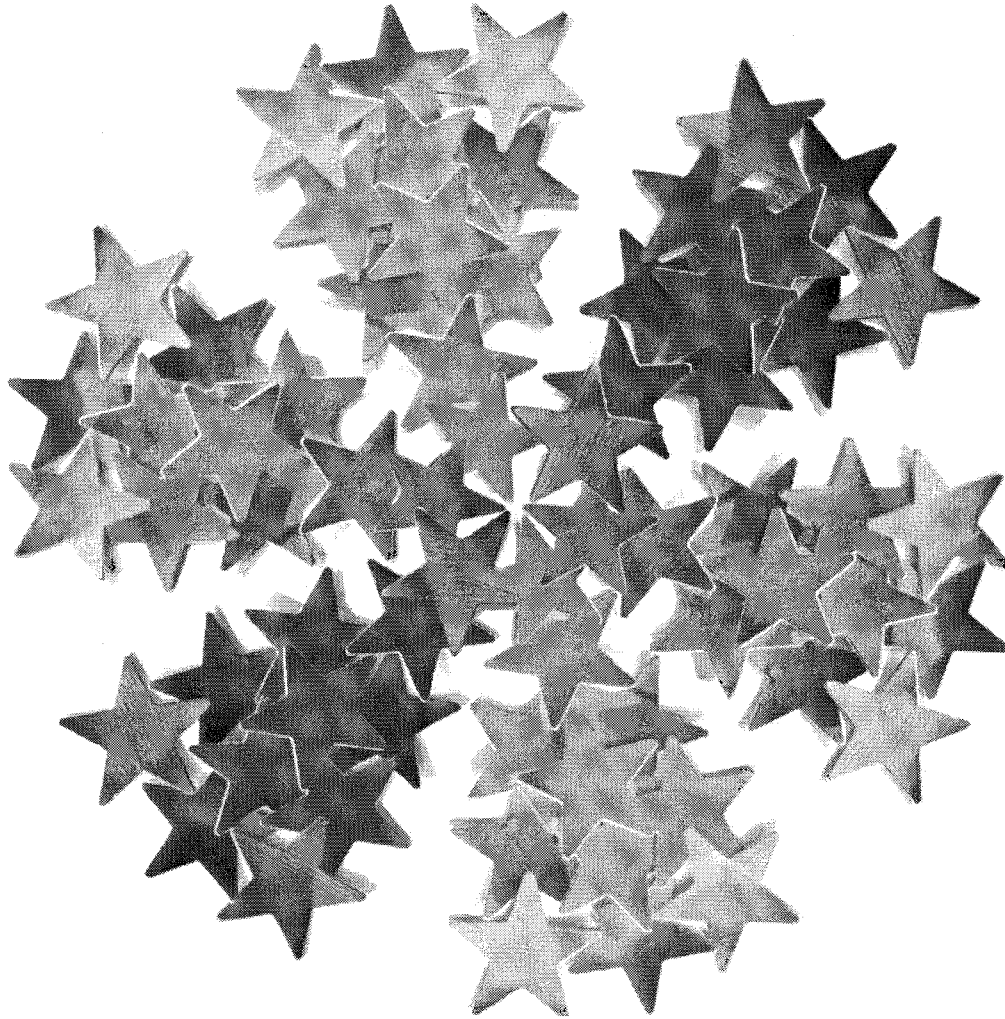


the evaluation partnership 

Deloitte.



PROPOSAL

Evaluation of the EURAXESS Project (2008 – 2012)

8 November 2012

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1 Introduction

This document constitutes the proposal from The Evaluation Partnership (TEP) and Deloitte to Directorate General Research and Innovation (DG RTD) in the context of the Framework Contract RTD-L05-2010-Impact Assessment related to the Evaluation of the EURAXESS Project (2008 – 2012). The proposal is submitted in response to a request from DG RTD in line with the specifications outlined in the Terms of Reference for the work to be conducted.

The purpose of this assignment is twofold. First, the aim is to assess the overall progress achieved after the re-branding and regrouping of EURAXESS Services and Jobs activities in 2008. The second aim is to evaluate the impact of EURAXESS Links in the US, Japan and China on the networking of European researchers.

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 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.
- **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.

2 Context

2.1 EURAXESS – Researchers in Motion initiative at a glance

As the core producers of new knowledge and the main agents in its transfer and use, researchers are indispensable for a competitive knowledge-based economy. A global approach is needed in order to attract and retain the best researchers, and to ensure that researchers benefit from the right training, attractive careers, and the removal of barriers to their mobility. Mobility is a key component of the European Research Area, which in turn is fundamental to the EU's growth and jobs strategy and vision for 2020¹, which aims to improve the dynamism and competitiveness of the EU economy.

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.

As stated in the tender specifications, *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 current EURAXESS activities are divided into four branches²:

1. *EURAXESS Services* which offers researchers assistance and provision of practical information through its European and national portals and network of Services Centres (over 200 across 40 participating countries);
2. *EURAXESS Jobs* which gives researchers access to job opportunities throughout Europe;
3. *EURAXESS Links* which connects European researchers in the US, Japan, China, Singapore and India and informs them about the latest developments in EU research policy and cooperation and with job opportunities in Europe;
4. *EURAXESS Rights* which provides information on rights and obligations in the research profession, social security and the scientific visa package.

¹ Europe 2020: A European strategy for smart, sustainable and inclusive growth (op.cit); <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>

² European Commission, EURAXESS, Retrieved from <http://ec.europa.eu/euraxess/index.cfm>

2.2 The birth of the EURAXESS – Researchers in Motion umbrella

Following its Communication, "Towards a European Research Area"³, 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"⁴ 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 was launched in June 2003. It was followed by the launch of the ERA-MORE network of Mobility Centres in June 2004.

The Commission commissioned Deloitte and TEP to carry out two evaluations of the European Researcher's Mobility Portal and the ERA-MORE network of Mobility Centres focusing respectively on assessing the extent to which the research community was aware of the initiatives and to identify how researchers could efficiently be made aware (in 2007) and on assessing the effectiveness of the Mobility Centres (in 2008).

The main conclusion of the evaluation of 2007 stated that awareness amongst European researchers about the ERA-MORE Network and the ERMP was generally low. Recommendations were made to enhance awareness by increasing ERMP visibility on internet search engines and proactively seeking out further multipliers. With regard to the branding the services, the evaluation recommended a single name and logo, i.e. for DG RTD to drop the former ERA-MORE slogan and to encourage the National Mobility Portals to showcase fewer logos. The effectiveness of the I&C activities could be improved by limiting the centralised production of I&C materials and continuing the development of I&C materials and activities at national level. Final recommendations included that the European Commission should continue the networking, exchange of experiences and sharing good practice and improve the ERMP. A coordinated, strategic and long term communication approach should be put in place and defined clearly in a policy document.

³ COM(2000) 6 Final *Towards a European Research Area*

⁴ COM (2001) 331 Final *A Mobility Strategy for the European Research Area*

EURAXESS Links was set up in 2006 under the name of ERA-Link in order to connect European researchers in the US to the broader network of European researchers. Later, Japan and China were added to connect both research communities to their counterparts in Europe.

In 2009, 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. Following the study, Singapore and India were established, given their strategic importance to the European Science & Technology policy⁵.

Both the ERA-MORE Network of Mobility Centres and the ERMP were reformed and together with the ERA-Link bundled under one framework. These activities were respectively renamed as EURAXESS Services, EURAXESS Jobs and EURAXESS Links which, together with EURAXESS Rights, form the current branches of EURAXESS – Researchers in Motion⁶.

⁵ European Commission, EURAXESS – Links Countries, Retrieved from http://ec.europa.eu/euraxess/links/countries_en.htm.

⁶ We do not refer to the EURAXESS “Rights”, fourth part of the EURAXESS – Researchers in Motion initiative, as we understand that this specific activity is not in the scope of this study.

3 Understanding of the objectives of the assignment

As stated in the ToR, the study will consist of two main evaluation areas:

1. **Part 1:** 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).
2. **Part 2:** evaluation of the impact of the functioning of EURAXESS Links in the US, Japan, and China on the networking of European researchers⁷.

Part 1 - EURAXESS Jobs and Services

This part will look at the overall progress made, the level of awareness within the researchers' community and the type and extent of assistance required by the researchers' community since the previous study.

As defined in the ToR, the following evaluation questions must be addressed, divided into:

- Evaluation questions concerning the **researchers' community**:
 - To which extent is the researchers' community aware of the existence of the EURAXESS tools for finding jobs 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?
- Evaluation questions concerning the **Services Centres** and the **stakeholders' community**:
 - To what extent have the six 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 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?

⁷ The EURAXESS Rights is not in the scope of this study

In addition to the examination and analyses of these questions, examples of good practice concerning the new features introduced since 2008 must be identified, such as:

- 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 training 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.

Furthermore, TEP and Deloitte will develop a set of recommendations for future improvement.

As the focus of the current assignment is to assess the overall progress achieved since the first evaluation study, we present hereafter the main conclusions and recommendations of the evaluation of 2007. They were formulated around six main themes. We also present our understanding of the objectives of the current study in relation to the overall progress in implementing these recommendations:

Table 1: main conclusions and recommendations of the evaluation 2007 and correlation with evaluation questions of the current request

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
Approach and Strategy	<ul style="list-style-type: none"> The Commission and the participating countries have undertaken some good work in the field of information and communication. There has been a good dialogue and strong communication between the Commission and the participating countries. While there is evidence of some good information and communication practice and progress, there is scope for further improvement, particularly in terms of developing a more strategic approach. The programme has lacked a Communication Strategy from the beginning. 	<p>For the ERA-MORE Network and European Researcher's Mobility Portal services to be a success it is essential that there is a coordinated, strategic and long term approach to communication taken by the Commission and the participating countries.</p> <p>The ERA-MORE Network and the European Researcher's Mobility Portal would benefit from a well defined and promoted <i>Communications Strategy</i> (at EU and National level) highlighting:</p> <ul style="list-style-type: none"> The (communication) objectives; The tactics, actions and tasks related to achieving those objectives (with associated timescales); The target audiences of communication campaigns; The key performance indicators (an evaluation strategy) so that progress can be monitored. 	<p>The assignment will aim to assess the progress achieved in designing and implementing a well defined and promoted communication strategy undertaken by the EC and the participating countries, as well as identify the related potential barriers and problems. In addition, we will assess, to the extent possible, the results stemming from the implementation of this recommendation.</p> <p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> 1. To which extent have the recommendations related to the approach and strategy been implemented? 2. What are the main problems and the main barriers hindering the full implementation of the recommendation? 3. Overall, to which extent has the

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
			objective of a coordinated, strategic and long-term approach to better communication of the activity been a success?
Awareness	<ul style="list-style-type: none"> There is generally low awareness among researchers of the ERA-MORE Network of Mobility Centres. This relates to the awareness of the ERA-MORE brand (name and logo), the existence of the Mobility Centres themselves and the fact that they are supposed to form part of a pan-European network. While awareness of the ERA-MORE Network appears to be low, there is some level of awareness among researchers that mobility services exist (particularly in countries with a history of attracting foreign researchers). Researchers generally associate these mobility services with international offices at universities. Awareness levels among the researcher community appear to be higher for the European Researcher's Mobility Portal compared with the ERA-MORE Network. However, awareness of the 	<p>It is recommended that the ERA-MORE Network and the European and National Researcher's Mobility Portals continue to proactively seek further "multipliers" (e.g. personnel within research organisations and institutions, research related websites, research job websites) to help promote the services throughout Europe. For example, all research related websites in the EU should be further encouraged to host links to the European and National Mobility Portals.</p> <p>It is recommended that work is undertaken to ensure that the European (and National) Researcher's Mobility Portals maintain and increase their visibility on the main internet search engines (for example, Google). It is highly likely that internet search engines are a popular source of information for researchers looking to work abroad. Further promotion of the Portals via internet search engines would be a simple and effective way of providing researchers with the mobility information</p>	<p>The objective is to assess in the one hand, the progress made so far towards the implementation of the recommendations as well as problems and barriers encountered and in the other hand, to assess the results stemming from the implementation. Therefore, we will assess the current level of awareness among the researcher's community. To feed into this EQ, we will also seek to determine to what extent the EURAXESS services are used by the Researcher's community in order to provide the Commission with relevant recommendations for further improvements.</p> <p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the researcher's community:</p> <ol style="list-style-type: none"> To which extent is the researcher's community aware

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
	<p>Mobility Portal is still considered to be low.</p> <ul style="list-style-type: none"> • Researchers are highly likely to search for information on the internet if and when they begin considering the option of working abroad. It is at this point that the European (and National) Researcher's Mobility Portals have their best chance of being discovered. • Currently, the low awareness of the European Researcher's Mobility Portal suggests that there is further scope for the site to be optimised for internet searches. The same applies for the majority of the National Researcher's Mobility Portals. 	<p>that they require. Additionally, this would help to raise awareness of the ERA-MORE Network of Mobility Centres.</p> <p>It is recommended that further research is carried out into how people actually search online for information relating to working as a researcher abroad. Knowledge of the most popular key word searches for this type of information could assist the management of the European (and National) Researcher's Mobility Portals in making it more prominent on the main search engines.</p>	<p>of the existence of the EURAXESS tools for finding jobs and funding opportunities (EURAXESS Jobs) as well as practical support for issues related to the mobility of researchers (EURAXESS Services)?</p> <p>2. To what extent does the researcher's community make use of the services and support provided by EURAXESS?</p> <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> 1. To which extent have the recommendations related to the awareness been implemented? 2. What are the main problems and the main barriers hindering the full implementation of the recommendation? <p>Examples of good practices:</p> <ul style="list-style-type: none"> - Have the national portals included information in matters as visa requirements, work permits, social security and pension rights? Are

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
			<p>they user friendly?</p> <p>- In particular, do the national portals provide updated information to researchers in different countries?</p>
Branding	<ul style="list-style-type: none"> The names and logos of the ERA-MORE Network and the European Researcher's Mobility Portal are used to varying extents by the participants in the network. While the names are used quite consistently, the logos are not. The profusion of logos and brand names makes it difficult for the ERA-MORE Network and the European Researcher's Mobility Portal brand to imprint itself on users. There is very little similarity between the current versions of the European Researcher's Mobility Portal and the National Researcher's Mobility Portals. Half of the participating countries have opted to design their national portals quite differently from the European version, while a third echo the previous design of the European Researcher's Mobility Portal. 	<p>It is recommended that a single name and logo be adopted. This should express the content of the European Researcher's Mobility Portal and the ERA-MORE Network of Mobility Centres service's in a succinct and clear way. The existence of two dissimilar names and logos for these services (which have similar goals in terms of aiding mobility) is not considered necessary and, to some extent, could be confusing for researchers. A one name, one logo brand that conveys an online and offline presence is deemed to have more worth in terms of raising awareness.</p> <p>It is recommended that the current ERA-MORE slogan is dropped. In its current forms it adds little value to the brand. A slogan is not deemed necessary for continuing to build the ERA-MORE brand.</p> <p>It is recommended that the National Researcher's Mobility Portals should</p>	<p>The main objective of this EQ is to assess the achievement of the re-branding and regrouping of the EURAXESS Services and Jobs. We will seek to identify the results and effects of the re-branding in relation to the previous EQ (awareness) as well as the progress achieved, potential problems and barriers encountered due to its implementation taking into account the conclusions of the 2007 study.</p> <p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> To which extent have the recommendations related to the branding been implemented? What are the main problems and the main barriers hindering the

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
	<ul style="list-style-type: none"> The URLs used by the national portals are to some extent inconsistent. Currently, only 40% of the National Mobility Portals use "eracareers" followed by their national domain name endings (For example, www.eracareers.se, www.eracareers.fr). The ERA-MORE slogan was not judged to be particularly relevant by the target groups surveyed. It does not say anything specific about the services on offer, and it is not possible to understand the meaning of the slogan without prior knowledge of what ERA-MORE means. 	adopt a more consistent approach in terms of design which will help reinforce the corporate identity. There is no need to impose a homogenous approach but there should be similarities in terms of the logos used, colour schemes and the words used in the URLs. Added to this the National Portal's should showcase fewer logos and names of policy programmes.	full implementation of the recommendation?
Effectiveness of Information and communication activities (EC and National level)	<p>The information materials produced by the Commission are deemed adequate to reinforce awareness among target groups particularly among those who are already familiar with the programme. However, they are not well adapted to awareness raising on their own.</p> <p>The focus of national ERA-MORE coordinators has primarily been on involving administrative staff at universities, and depending on them as multipliers to get the relevant</p>	<p>It is recommended that communication material produced by the Commission should focus on communicating to policy makers and national administrations – stepping up awareness raising activities to highlight the importance of researcher "mobility" and looking for commitment from participating countries.</p> <p>It is recommended that communication material produced by the Commission should be limited to generic material.</p>	As for the awareness level and the branding, the effectiveness of information and communication activities will be examined through the prism of their implementation and their achievement. We will take the opportunity to identify any problems and barriers, in order to provide the Commission with recommendations for further improvements.

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
	<p>information to the researchers. While necessary, this should not be the end of activities designed to reach potential multipliers. Currently, multipliers such as departmental staff in research organisations, institutes and universities, funding bodies and journalists are being under-exploited in many of the countries studied. Added to this, there is also scope to attract further on the internet. E.g. specific research field websites, funding sites, national research portals etc.</p>	<p>For example, business cards.</p> <p>It is recommended that the Commission explore ways in which generic communication material can be produced centrally and customised locally. For example, by developing templates and distributing these electronically to participating countries where they can be customised.</p> <p>It is recommended that production of communication material and organisation of promotional activities should continue to be developed in participating countries that are able to take a customised approach. (The evaluation recognises that this will require financial and resource commitments as well as a commitment to the programme itself).</p>	<p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> 1. To which extent have the recommendations related to the effectiveness of information and communication activities been implemented? 2. What are the main problems and the main barriers hindering the full implementation of the recommendation? 3. Overall, to which extent has the objective of a coordinated, strategic and long-term approach to better communication of the activity been a success?
Role of the European Commission and Participating Countries	<ul style="list-style-type: none"> The Commission has taken a "hands-off" approach in terms of how communication activities under the ERA-MORE Network have been implemented in the participating countries. It has limited its role to providing support materials and organising information activities for national ERA-MORE coordinators 	<p>It is recommended that the Commission focus on providing strategic guidance and assisting participating countries draw up a concrete communication plan (as mentioned under the <i>Approach and Strategy</i> recommendations), detailing objectives, the key target groups they want to reach and concrete actions to be taken over a clearly defined time</p>	<p>Related to the approach and strategy, these evaluation questions will focus on the recommendations made concerning the role of the EC and participating countries in order to improve the information and communication activities of the EURAXESS Services and, thus of the level of awareness among the</p>

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
	<p>and a number of policy makers.</p> <ul style="list-style-type: none"> While the Commission has made some significant improvements to the European Researcher's Mobility Portal there is scope to enhance it further. More specifically, there is a view that the way in which "research fields" are classified could be improved, although it should be noted that there is a 'free text' search on the portal. Additionally, there was some evidence to suggest that it could be made easier for participating institutions, universities and other relevant parties to upload positions into the database. 	<p>span.</p> <p>It is recommended that the main role for the Commission lies in facilitating networking and the exchange of experiences and ideas. In this regard, the Commission should:</p> <ul style="list-style-type: none"> Continue to ensure that all national ERA-MORE coordinators and ERA-MORE Mobility Centre staff have easy access to each other's contact details, and that there is a complete email distribution list. This could be used to provide everyone with regular updates on new developments, and also to enable contacts between the different countries themselves. Equipped with the necessary information, it will be important for ERA-MORE national coordinators and the Mobility Centre staff to make good use of it, particularly in terms of networking and exchange of experiences and good practice Continue to dedicate some time every year to hosting a training session or seminar on specific subjects or good practices. Relevant subjects could include the development of a communication 	<p>researcher's community and the use made of the services offered. We will specifically look at the way the overall coordination, the exchange of experiences and ideas as well as the training sessions have been improved and the extent to which the recommendations were implemented.</p> <p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the researcher's community:</p> <ol style="list-style-type: none"> To what extent does the researcher's community make use of the services and support provided by EURAXESS? <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> To which extent have the recommendations related to the role of the EC and participating countries been implemented? What are the main problems and the main barriers hindering the full implementation of the recommendation? Overall, to which extent has the

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
		<p>plan / strategy; the use of specific tools or channels; reaching different target audiences; co-operation and co-ordination between the different levels (ERA-MORE National coordinators and Mobility Centres); evaluation and impact analysis; etc. These seminars would also represent an additional opportunity for networking and information exchange.</p> <p>It is recommended that the Commission continue to look at ways of improving and further enhancing the European Researcher's Mobility Portal for users (and for those posting opportunities). Evidence suggests that there is scope to improve the search criteria and the categories by which users can search for jobs. Most of these issues relate to how research fields are classified. Presently, there is no international agreement on research field classification but there is ongoing discussion and debate around the subject which it will be important for the Commission to monitor closely.</p>	<p>objective of a coordinated, strategic and long-term approach to better communication of the activity been a success?</p> <p>Examples of good practices:</p> <ul style="list-style-type: none"> - 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 training 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.
Challenges and Risks	<ul style="list-style-type: none"> • Sustainability: The major risk for the ERA-MORE Network and the European Researcher's Mobility 	It is recommended that the Commission and the participating countries jointly assess the risk to the sustainability of the	In replying to this question, we will look at the actions taken to ensure the sustainability of the EURAXESS

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
	<p>Portal is the fact that EU funding for them is foreseen to end. Therefore, sustainability of these initiatives will be dependent on the support provided in each of the countries in which they operate (this support is likely to include the commitment of human and financial resources as well as the political commitment to continue).</p> <ul style="list-style-type: none"> • Homogeneity of the services provided: Currently, the ERA-MORE Network of Mobility Centres is not homogenous (as alluded to in some information and communication material). The network is managed, structured and operated differently depending on the country, and focuses on providing services to different types of target audiences (incoming, outgoing and returning researchers). While the way in which one country operates its ERA-MORE Network may or may not be better than the next, the fact is that the current state of the network makes information and communication related exercises, particularly at European level, all the more difficult. 	<p>ERA-MORE Network and the European (and National) Researcher's Mobility Portals without EU funding, as soon as possible. If a risk is identified (as this evaluation suggests), the Commission and the participating countries need to develop a mitigation plan to ensure that both initiatives are sustainable. It is important to reiterate that the evidence from this evaluation suggests that there is potentially a high level of interest in these mobility services particularly from younger researchers.</p> <p>It is recommended that information and communication activities and material are developed predominantly at country level so as to accurately reflect the situation of the ERA-MORE Network in that particular country. Additionally, any information and communication work undertaken at European level should avoid portraying the ERA-MORE Network as completely homogenous, particularly as this could lead to unrealistic expectations among researchers.</p>	<p>Services and Jobs as well as any tasks undertaken in relation to the coordination of the information and communication activities and material development (also tackled in EQ related to the role of EC and participating countries). We will specifically look at the risks identified and related mitigation actions and their uptake at strategic level.</p> <p><u>Related EQ:</u></p> <p>Evaluation questions addressed to the Services Centres and the stakeholders' community:</p> <ol style="list-style-type: none"> 1. To which extent have the recommendations related to the challenges and risks been implemented? 2. What are the main problems and the main barriers hindering the full implementation of the recommendation? 3. Overall, to which extent has the objective of a coordinated, strategic and long-term approach to better

Evaluation 2007			Evaluation 2012
Main Theme	Conclusions	Recommendations	Correlation with evaluation question (EQ)
			communication of the activity been a success?

Part 2 - EURAXESS Links

This part will discuss the impact of the EURAXESS Links in US, China and Japan.

The following evaluation questions will be examined, and if necessary, adapted to each country to assess the impact of EURAXESS Links.

- How many members are there and how many participate actively? What services are 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 EU 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 has this initiative 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?

TEP and Deloitte will develop a set of recommendations for future improvement of the services offered by the EURAXESS Links hubs.

It is expected that the Commission will be able to provide profile data on current users. However, in order to assess the relevance of the services currently being offered, the study team will make use of the feasibility studies carried out prior to the launch of EURAXESS Links China, Japan and the US (respectively in 2007, 2008 and 2005). *Inter alia*, the survey data from these studies will allow the evaluators to ascertain the extent to which the services being offered correspond to the needs and expectations expressed by evaluators at that time.

We will also build on the overview of EURAXESS Links Japan and US (formerly ERA-Link) based on data collected during the feasibility study in 2009. The data collected were mainly related to:

1. Total number of active members;
2. Percentage of EU members by nationality;
3. Governance system;
4. Reporting requirements;
5. Type of communication tools used;
6. Type of activity/services offered to researcher's community/members.

This will allow us to define a baseline situation that can be analysed to identify any improvements and achievements since the previous studies.

4 Approach and work plan

4.1 Introduction

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 "context" and "understanding of the objectives of the assignment");
- a comprehensive and tailored methodological approach for gathering and analysing data to ensure a strong base of evidence and coverage of all tasks specified in the Terms of Reference (see next sub-section "our specific approach to perform the tasks");
- 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.

Our work plan to perform the evaluation follows three phases:

- Phase 1: Structuring (inception);
- Phase 2: Data Gathering;
- Phase 3: Analysis, Judgement and Reporting.

Our work plan will enable us to organise and manage the different tasks of this assignment and simultaneously handle the two parts of the study (Parts 1 and 2).

Combined with our management approach (see next chapter), our project plan will allow us monitoring the different tasks to respect the scheduling of the project.

4.2 Phase 1 – Inception phase

The first phase comprises seven steps:

1.	Phase 1 - Inception
1.1.	Kick-off meeting
1.2.	Preliminary interviews with DG RTD officials
1.3.	Preliminary desk research
1.4.	Refine methodological approach
	Analytical framework
	Work plan
	Data collection tools
1.5.	Draft Inception report
1.6.	Draft Inception report meeting
1.7.	Inception report (finalised)
	Subtotal phase 1 days

4.2.1 Kick off meeting (activity 1.2)

As stated in the Terms of Reference, the kick-off meeting will take place as soon as possible after the signature of the contract.

The kick-off meeting will provide a good setting to start the project, present and discuss the work plan with the Steering Group and transfer to the evaluation team all the available information and/or documents that could be relevant to the evaluation 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 preliminary work plan and the tools;
- Agree on a list of sources, reports and evaluation reports and other secondary sources of information.

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

4.2.2 Preliminary interviews (activity 1.2)

We will conduct up to three interviews with members of the steering committee in order to deepen our understanding of the context and issues related to the scope of the study.

This is also the occasion to identify other relevant stakeholders who should be interviewed during Phase 2 (Data gathering).

These preliminary interviews will feed into the final version of the Inception Report.

4.2.3 Preliminary desk research (activity 1.3)

We will collect and examine available documents in relation with the subject of the study.

Following the interviews with members of the steering group and based on the information received during the kick-off meeting, a first set of relevant documents will be analysed. We will undertake this task in order to identify all contextual elements, issues, and existing studies, as well as activity reports, etc. related to all evaluation questions defined in the tender specifications.

Desk research will be a continuous process starting in phase 1 but would be revisited, if appropriate, after the interviews and throughout the project.

4.2.4 Refine methodological approach (activity 1.4)

We will then review and fine-tune our methodological approach concerning data collection and analysis.

This will be documented in an analytical framework mapping all key questions and data that should be collected in order to reply to these questions. We will draft interview guides and questionnaires for the web-based surveys, and refine the study work plan.

4.2.5 Draft Inception Report (activity 1.5)

We will then draft the inception report three weeks after the kick-off meeting. The draft inception report will contain a further detailed work plan, as well as draft interview guides, draft questionnaires for the web-based surveys, ... to be validated by the Commission before the start of the data gathering phase.

4.2.6 Draft Inception Report meeting (activity 1.6)

A meeting will be organised with the Commission to present and discuss the draft Inception Report.

4.2.7 Finalise Inception Report (activity 1.7)

Five working days after the reception of the Commission's comments, we will submit the final report.

4.3 Phase 2 – Data gathering

This second phase will consists of eight steps.

2.	Phase 2 - Data gathering
2.1.	Desk Research (including MORE2 survey)
2.2.	Face-to-face or phone interviews with EU level stakeholders (max. 10)
2.3.	Web-based surveys (3)
	EURAXESS members (including Web-based survey at country level)
	BhOs and ESCs
	EURAXESS Links members (countries selected)
2.4.	"Poll-type" interviews at four (4) scientific conferences
	Preparation of the attendance (selection of events, organisation)
	Attendance and "poll-type" interviews
	PART 1
2.5.	Preparation of the fieldwork (focus group and interviews)
2.6.	Fieldwork in ten (10) EURAXESS member countries including per country:
	Interviews (max. 8)
	Key EU stakeholders (2/3)
	Bridgehead Organisation (1)
	EURAXESS Service Centres (2)
	Voice of the Researchers representatives (2)
	Focus groups (1)
	National desk research
	PART 2
2.7.	Preparation of the fieldwork
2.8.	Fieldwork in three (3) EURAXESS Links destinations (US, Japan and China) including per country:
	Interviews (max. 8)
	Information Officer (1)
	EURAXESS Links members (researchers) (4)
	EU Delegation (1)
	Cooperation programme representatives (2)
	National desk research

4.3.1 Desk research (Activities 2.1)

The desk research will be conducted in parallel with the first round of interviews at EU level (activities 2.2). The desk research will be a dynamic exercise, continuing along the evaluation process.

All relevant information will be captured in a reporting template in line with the analytical framework. Structuring the relevant information in a comparable format allows the evaluator to identify missing information, gaps in the analysis and risks that could occur during the evaluation process.

Specifically for Part 1, we will aim to collect relevant documentation, availability permitting, such as:

- Any annual reports related to the activities of the EURAXESS Services and Jobs (at both EU and national levels, e.g. final reports for the member countries for the period covered by this assignment 2008-2012);

- Any surveys or audience-level data relative to the communication tools that have been used (e.g. EURAXESS portal (EU and National) visits, figures on the activities of the Services Centres, etc.);
- Evaluation reports (2007 and 2008 evaluations).

Specifically for Part 2, we will aim to collect relevant documentation, availability permitting, such as:

- Any monthly reports related to the activities of the EURAXESS Links in the US, Japan and China;
- Any survey or study carried out by the EURAXESS Links information officers in the US, Japan and China;
- When made available, the results of the MORE2 survey of researchers in non-EU countries concerning the three Links destinations.

4.3.2 Interviews with EU level stakeholders (activities 2.2)

We will conduct semi-structured interviews with a series of European stakeholders. The interviews will aim to gain further insights into activities conducted by the EURAXESS activities among international and EU stakeholders such as:

- EARTO (European Association of Research and Technology Organisations)
- EI (Education International)
- EIRMA (European Industrial Research Management Association)
- EIROForum
- EUA (European University Association)
- EURODOC (European Council of Doctoral Candidates and Junior Researchers)
- Marie Curie Fellowship Association (MCFA)

We will conduct a series of up to ten face-to-face or phone interviews (in English) with representatives of the above-named and other organisations, with the list to be finalised before the finalisation of the inception report.

We intend to design a semi-structured interview guide that specifies the different themes to be treated while maintaining the flexibility for interviewers and interviewees to broach other topics considered particularly salient or important.

The list of interviewees will be defined in collaboration with the European Commission.

4.3.3 Web-based surveys (activities 2.3)

We propose to conduct three web-based surveys of:

1. the Bridgehead Organisations (BhOs) and the EURAXESS Service Centres;
2. the researchers registered to the EURAXESS portal (we propose to conduct an open web-based survey, with the survey accessible via a link on the EURAXESS portal. An e-mail with a link to the web-based survey will also be sent to the EURAXESS researchers' database)
3. the researchers registered to the EURAXESS Links destination (providing that the link can be disseminated by the Information Officer or/and integrated into the newsletter).

The ToR specifies that a web-based survey shall be carried out in each country selected for the fieldwork. We suggest extend this survey to all EURAXESS members (see above point 2.). However, we will put particular emphasis to the countries selected for the fieldwork. The Terms of Reference requires that the contractor shall guarantee at least 500 replies that will be representative of the population of researchers in the country selected taking into account differences in gender and stages of their careers.

We will tend to the results expected by relying on different dissemination channels (multipliers):

- BhOs and ESCs to disseminate the survey to their members ;
- A link to the survey on the EURAXESS portal (EU and national) ;
- NCPs to disseminate the survey to their network;
- HR department of research institutes and universities.

We will also closely follow-up and track response rate to identify which country requires a specific attention (reminders, seeking for more multipliers, etc.). However, relying on the multipliers, as defined above, will not allow us to have full control over the distribution of the responses among the countries.

The table below illustrates the response rate we have to reach to ensure proportional distribution of responses compared to researchers' population⁸.

⁸ It should be noted that, by country, it will not be possible to analyse the data per gender or per stage of career. Nevertheless we will be in a position to analyse the data for the whole sample taking into account these differences. We cannot however guarantee that the distribution by gender and by stage of the career will be fully in line with the distribution of these factors in the population as we monitor the sample ex post. In order to cope with this, one statistical solution then could be to give different weights to the categories in order to reflect the distribution in the population. Moreover, taking into consideration the principle of proportionality at a country level, as requested, it will not be possible to compare the countries with each other and to say that "Bulgarian have different opinion than the others". Indeed, with less than 10 respondents for some countries, it is impossible to decide whether these 10 people are "special" for Bulgaria, or if by pure chance they happen to have the same opinion as most of their peers. This has been discussed, clarified and approved by the Commission during our Q/A meeting held on 21 August 2012. It has indeed been emphasized that the purpose is not to compare the countries with each other, but to analyse the evolution between the previous evaluation and the new one.

Table 2: Researchers (Head Count) and the respective number of responses by country to ensure proportionality in the country selected for fieldwork, 2008

Country	Head Count	Response rate
Austria	58 217	27
Bulgaria	13 416	7
Croatia	11 915	7
Czech Republic	44 240	20
Italy	145 623	68
Netherlands	59 719	28
Norway	44 145	20
Poland	97 474	45
Spain	217 716	102
United Kingdom	376 137	176
TOTAL	1 068 602	500

Source: Deloitte

The surveys will be hosted on a dedicated site to allow responses to feed directly into our specialised survey software, with a link to the survey included in an email sent to the BhOs, the ESCs and the IOs by the European Commission.

The majority of questions will be in the format of closed questions, which ask respondents their level of agreement with a series of statements. A four-point rating scale is used to generate statistics which indicate the degree of agreement or disagreement of respondents. This approach provides much greater insight than a 'black and white' yes/no tick-box approach, which allows only limited scope to delve into respondents' perceptions. Whilst closed questions guide respondents to consider key issues and questions that DG RTD would like addressed, the survey will include some open questions to allow additional spontaneous feedback.

The questionnaires will be available for respondents in English. The web-based surveys will be open during five to six weeks.

4.3.4 Poll-type interviews at four International Scientific Conferences (activity 2.4)

For this activity, we will focus on collecting data to feed into the analysis related to Part 1.

In order to gain a better view on the level of awareness of the EURAXESS activities among the researchers' community and thus to be able to compare with the results of the previous study, we suggest to attend four International Scientific Conferences and conduct "poll-type" interviews with researchers attending the conferences. The questionnaire will mainly consist of close-ended questions and will be short enough to ensure sufficient responses. Interviews will be conducted either in English or, if possible, in the respondents mother tongue. Two consultants will be present at each conference to ensure the required number of responses can be gathered in the limited time available.

The conferences will be selected with the support of the Commission. We will contact the conference organisers in order to agree the interview process and to discuss the logistics (e.g. where in the conference agenda interviews can best take place).

4.3.5 Preparation of the fieldwork activities (activities 2.5 and 2.7)

The evaluation team will prepare during this step the various fieldwork activities (identifying and contacting potential interviewees, making arrangements for the interviews and organising the focus groups).

The preparation of the fieldwork will be crucial for the implementation and smooth running of the activities to be carried out. Careful attention should be paid to this activity in order to ensure relevant data collection. Indeed, the identification of the relevant individuals to be interviewed will help ensure the usefulness of the data. To do so, we will rely on the Commission, the BhOs and ESCs and the IOs to help us identify the most relevant stakeholders. We will also take any opportunities to ask for relevant contacts throughout the evaluation activities.

In addition, the preparation of the focus groups for Part 1 will require thorough organisation.

The selection of the participants in the focus group will require the cooperation of the Services Centres. The participants in the focus groups will be identified with the support of the Services Centres and the European Commission. Participants will be contacted by the consultant on behalf of the Commission. We will conduct one focus group per country selected gathering six to eight participants maximum.

4.3.6 Fieldwork in ten EURAXESS member countries (activity 2.6) and three EURAXESS Links destinations (activity 2.8)

To assess in more detail the extent to which the various EURAXESS services have been effective within a specific set of countries, the study team will undertake a series of fieldwork exercises in ten EURAXESS member countries (Austria, Bulgaria, Croatia, the Czech Republic, Italy, Netherlands, Norway, Poland, Spain and UK, as specified in the ToR) and EURAXESS Links destinations (China, Japan and USA).

For EURAXESS member countries, we propose to carry out the following activities:

- a series of face-to-face interviews (max. 8) with:
 - Key EU stakeholders (representatives at country level);
 - Bridgehead Organisation;
 - EURAXESS Services Centre staff;
 - Representatives of the Voice of the Researchers.
- a focus group with researchers aware or using the EURAXESS Services;
- desk research regarding all the relevant documents and information at national level;
- a web-based survey (see previous sub-section)

For EURAXESS Links destination, we propose to carry out the following activities:

- a series of face-to-face interviews (max. 8) with:
 - Information Officer;

- EURAXESS Links members (researchers registered to the newsletter, data availability permitting);
 - EU Delegation (when appropriate the S&T counsellor);
 - Representatives of cooperation programme.
- desk research regarding all the relevant documents and information at national level.

All the fieldwork activities will take place in English

4.4 Phase 3 – Final analysis and reporting phase

Phase 3 consists of eight steps:

3.	Phase 3 - Analysis and judging
3.1.	Draft Interim report
3.2.	Interim report meeting
3.3.	Interim report (finalised)
3.4.	Analysis of data collected to feed final report
3.5.	Draft final report
3.6.	Final report meeting
3.7.	Final report
3.8.	Final Technical Report

4.4.1 Draft interim report, interim report meeting and final interim report (activities 3.1, 3.2 and 3.3)

The interim report will be submitted three months after the kick-off meeting. As stated in the Terms of Reference, these reports will provide information concerning 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 source 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 interim report will be presented during a Steering Group meeting. Once validated, the evaluation team will submit the final version no later than ten working days after receipt of Commission's comments.

The interim report will be submitted in English.

4.4.2 Analysis of data collected to feed final report (activity 3.4)

The findings from the different Phases of the evaluation will be analysed, summarised and put into the analytical framework that was developed earlier in the study. This will allow us to verify that all of the evaluation issues have been addressed. Findings will then be triangulated, synthesised and analysed. This information will be used to answer the evaluation questions and to define draft conclusions and recommendations.

4.4.3 Draft final report, final report meeting and final report (finalised) (activities 3.5, 3.6 and 3.7)

The final report will contain the answers to the evaluation questions conclusions and recommendations. The report will cover all points of the work plan and shall include sound analysis of findings and factually based conclusions and recommendations.

As required by the Terms of Reference, no later than six months after the signature of the contract, a draft final report will be submitted consisting of:

- an executive summary of five to ten pages;
- the report itself;
- technical annexes, including the data used for the evaluation;
- a PowerPoint presentation of the work done, its conclusions and recommendations.

The report will include at least a description of

- the purpose of the evaluation;
- the scope of the evaluation;
- the design and conduct of the evaluation;
- the evidence found;
- the analysis carried out;
- the conclusions drawn, in the form of answers to each of the evaluation questions and sub-questions;
- the recommendations made, especially as regards future communication projects, linked to the corresponding evaluation questions

The final report (except the slide presentation, which will be made available only in electronic form) will be submitted in ten copies and in electronic form compatible with the Commission's computer facilities.

The final report will be submitted in English.

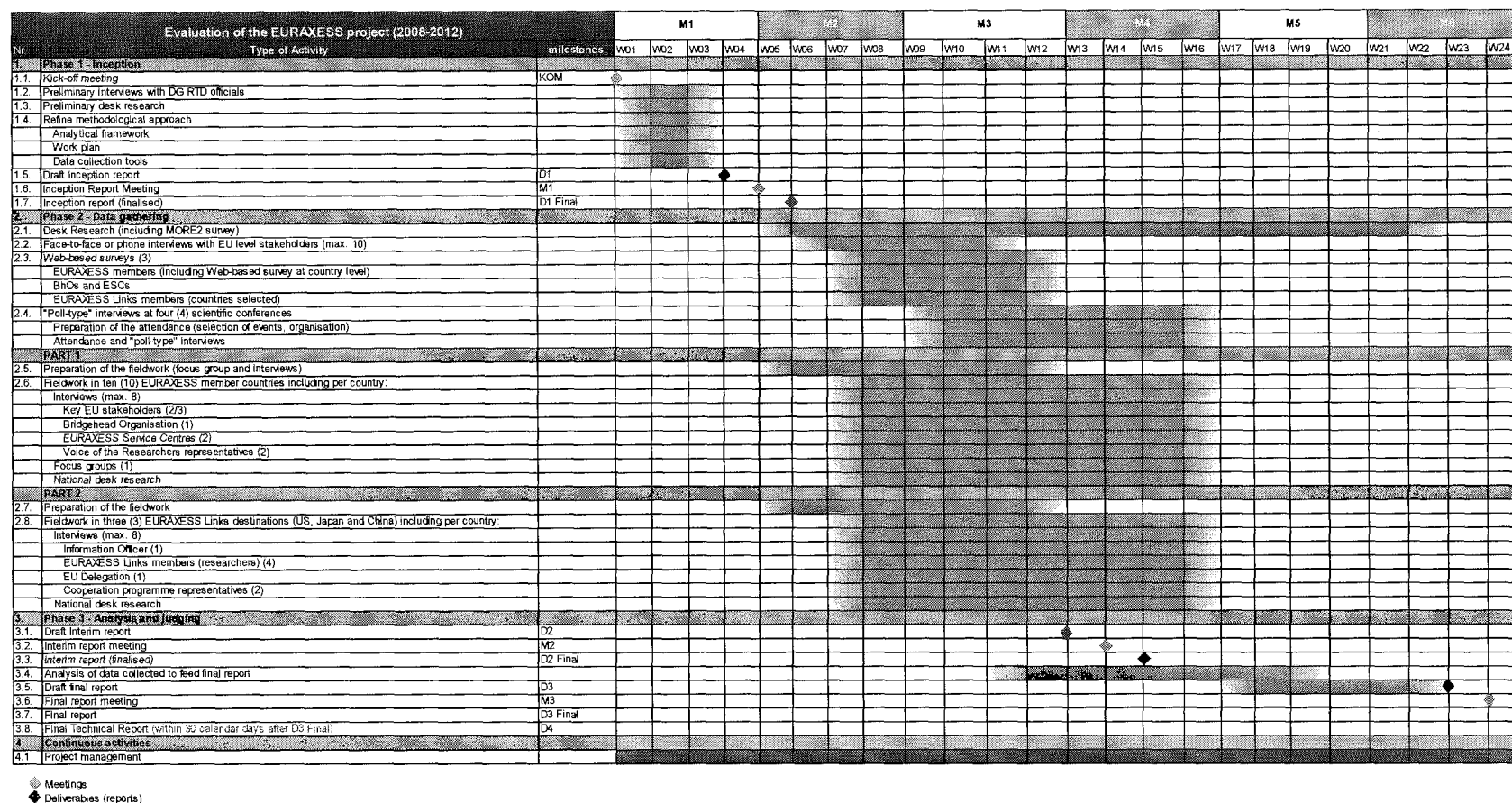
4.4.4 Technical final report (activity 3.8)

In accordance to the Framework Contract under which this assignment is carried out, a technical final report, which describes the performance of the services, will be submitted within 30 calendar days after acceptance of the Final Report and no later than 30 calendar days after the end of the contract.

More precisely, it describes all the work carried out, including problems encountered and solutions, a financial breakdown, and the results obtained under the Specific Contract. Save where the Specific Contracts contain provisions to the contrary, the Contractor must provide reports in English and forward to the Commission one copy by electronic mail and one original paper copy of the report plus one copy of it.

4.5 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.



5 The Budget

5.1 Budget

This section provides a breakdown of the costs that would be involved in delivering this work for DG RTD. All fee rates are those described in the DG RTD Framework Contract RTD-L05-2010-Impact Assessment. The price for the work to be undertaken This price includes in fees, in travel costs, in hotel costs and per diem costs.

The next tables show respectively the detailed breakdown of budget per activity and team member, and the breakdown of travel, hotel and per diem costs.

5.2 Payment terms

Within thirty days of the date of the acceptance of the Inception Report, an interim payment corresponding to 30% of the total value of the specific contract shall be made. The request for payment will be accompanied by:

- The Inception Report in accordance with the instructions laid down in the Terms of Reference;
- The relevant invoice, indicating the reference number of the Contract and of the specific contract to which it refers.

The request for the payment of the balance will be made upon approval of the Final Technical Report. The request for payment of the balance will be accompanied by:

- The final technical Report in accordance with the instructions laid down in the Terms of Reference;
- The relevant invoice, indicating the reference number of the Contract and of the specific contract to which it refers.

6 Proposed team

The proposed team offers a unique blend of skills necessary to undertake this challenging evaluation in the most rigorous and robust manner. In particular our team brings:

- **Understanding of evaluation systems and approaches:** deep knowledge of professional standards for evaluations and the ability to apply them to particular assignments;
- **Credentials in evaluations of information and communication (I&C) activities:** experience in designing, implementing projects of a similar nature;
- **Methodological expertise,** in particular in qualitative research: expertise in designing and implementing evaluation tools tailored to gather an in-depth understanding of the intervention and the reasons that govern it;
- **A focus on quality** and customer satisfaction as evidenced by our quality assurance techniques detailed in the next chapter.

The evaluation team for this assignment draws on a combination of evaluation rigor, engagement know-how, and project management expertise. The section below provides a brief overview of the key team members who would be involved in delivering this review. More detailed information about each team member is outlined in subsequent paragraphs.

Ensuring high quality of work

TEP and Deloitte's Quality Assurance standards	
1. Relevance of the study:	The study adequately responds to the information needs as expressed in the Terms of Reference.
2. Description of the subject of the assignment:	The subject and background of the study is described and documented clearly and accurately, so as to set the stage for the assignment.
3. Context Analysis:	The context is examined and analysed in a sufficient level of detail.
4. Description of Methodology:	The objective, tasks, questions, and applied procedures, methods, tools and techniques are accurately documented and described.
5. Identification of Information Sources:	The information sources used in the course of the assignment are documented in appropriate detail, in order to allow for an assessment of the reliability and adequacy of the information.
6. Reliable Data:	The data collected is adequate for the purposes of the evaluation and its reliability has been established.
7. Sound Analysis:	The data are systematically analysed to answer the evaluation questions and to cover other information needs in a valid manner.
8. Credible Findings:	The findings are based on a systematic review of valid and reliable information collected through appropriate methods. Qualitative and quantitative information was analysed systematically, and the questions effectively answered.
9. Justified Conclusions:	The conclusions reached in the evaluation are explicitly justified, so that the audiences can assess them.
10. Realistic and Feasible Recommendations:	The recommendations were checked for their feasibility and realism, in order to ensure that they can be implemented and represent a genuine improvement over the current situation.