



EUROPEAN COMMISSION
DIRECTORATE GENERAL FOR RESEARCH & INNOVATION

Directorate B - European Research Area
Unit B2 - Skills

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To:

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

From:

European Commission
Head of Unit RTD B2-Skills
ORBN 02/124

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

The European Commission Directorate for Research and Innovation, Unit B 2 – Skills, requests your services in the context of Framework Service Contract RTD-L05-2010 Impact Assessment to perform a background research related to the geographic expansion of the EURAXESS-Links Network.

I. TECHNICAL SPECIFICATIONS

a) General aim of the request for services

As indicated in the section 4.1.2 of Work Programme People 2013, several activities are planned in relation to the Innovation Union Commitments #1, #4, #30 including issues related with the entry conditions for Third Country Researchers.

In this context the Directorate-General for Research and Innovation of the European Commission requires your professional expertise and support to analyse the research population and policy framework in a group of pre-defined countries that may be covered by the EURAXESS Links Network during the third phase of the project (2016-2020).

b) The EURAXESS Links Project overview

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 policy objectives of attracting more researchers to work in one of the excellent research centres in Europe, the aim of Links is to constantly increase number of network members to keep them informed and connected to Europe. The outreach to and the networking of the different researcher's communities in the respective countries / regions may support international mobility, joint participation in FP7 /H2020 projects, collaboration in global research fields by connecting researchers, institutions and the European base and has thus the potential of providing new opportunities to all of them.

Over the years the umbrella initiative EURAXESS- Researchers in Motion has become a powerful ERA policy implementation tool by promoting mobility and career development. To adapt to this development and to further enhance it, the role of the EURAXESS Links Representatives has been enlarged consequently: as of 2013 they have become an important reference also for non-European researchers abroad, giving them information on opportunities in Europe and assisting them when relocating to Europe.

c) EURAXESS LINKS Phase 1 and 2: the key points.

In 2008 TEP COFFEY and Deloitte Consulting performed a feasibility study on the geographical expansion of EURAXESS Links aiming at identifying the most suitable countries to be integrated in the first phase of the project and to setting-up a database of researchers to be the core base of the future network¹.

The first phase of the project ended in 2012 and was characterised by a learning-by-doing approach and a gradual expansion of the network to the United States of America, Japan, China, India and Singapore.

In 2012 a Framework Service Contract was signed at DG RTD.B level to support the animation of the project for the period 2013-2015. A central structure has been set-

¹ Deloitte and The Evaluation Partnership Limited (TEP), Final report on the Feasibility study on the geographic expansion of EURAXESS-Links Abroad (ELA), specific Agreement No RTD/Dir C/C4/2008/0227619, implementing the Framework Contract RTD-C5-2005-I&C for the Assessment of the Impact of Information and Communication Policy Products, Lot 4 available at http://ec.europa.eu/euraxess/links/about_en.htm

up to coordinate a stronger network of EURAXESS-Links Representatives performing their duties in 6 geographic areas covering USA, Canada, Brazil, India, China, Japan and 5 ASEAN Countries (including Singapore). New tasks have been added to increase the coherence and visibility of the network. A total of 14 people are currently involved in the project at the Contractor's level (central and local level).

In 2012 an evaluation study performed by TEP COFFEY and Deloitte Consulting was launched (implementing Framework Contract RTD-L05-2010-Impact Assessment) to assess the performances of the EURAXESS project including, partially, the first phase of EURAXESS Links. The final results of this study are expected by July 2013.

d) Preparatory work for phase 3: contractor's tasks

The contractor will be requested to collect data helping the Commission to identify the exact geographic expansion of EURAXESS Links during the third phase of the project (2016-2020).

The request covers 9 candidate countries pre-selected by our service: Chile, Argentina, Peru, Australia, New Zealand, South Africa, Russia, Mexico and South Korea.

Depending on the outcomes of this study, the Commission will decide on a possible extension and in case of one, which countries.

The contractor will be requested to perform 4 tasks:

1. **Mapping Exercise of the Research Community:** in line with what has been done in 2008, the contractor will be asked to perform a mapping exercise aiming to identify (a) how many researchers are located in the country, both European and non-European; (b) the evolution of the researchers' population over the last 5 years (c) career stage (d) private or public sector (e) research field. This task will be performed in remote. Following an in-depth analysis of the countries, phone interviews may be organised to collect data and to get insights from relevant actors to increase the understanding on what are the needs and the key expectations/problems of the local research communities in relation with the mandate of EURAXESS.
2. **Mapping Exercise of the collaborations** currently implemented by the European Institutions and the Member States with the pre-selected target countries aiming at identifying synergies and new areas for actions and further cooperation. This mapping exercise (desk research) will also outline the actors involved in collaborative research projects with the target countries, both within the European Institutions and among the Member States and Member State initiatives in collaboration with the EC.
3. **Identification of policy strategy:** desk research and direct face-to-face or phone interviews with EU Officials and representatives of Member States aiming to

better understand the policy strategies of the leading actors within the target countries.

4. **Analysis, reporting and roadmap** as a result of the overall process, the contractor will present an analysis by country and will suggest a road-map for the geographic expansion of the EURAXESS Links initiative during the period 2016-2020.

e) Resources allocated to the project

The core task of the project is based on desk research and analysis that will be carried out mainly by junior consultants under the supervision of senior staff. This will reduce costs while guaranteeing the quality of data gathering. The coordinators will be involved in the desk research and analysis in remote and may be asked to interview representatives of the EU Member States and representatives of the pre-selected countries based in Brussels (Representations to the European Union). Finally the core task of the coordinator will be the analysis and reporting exercise together with the elaboration of the roadmap.

Total budget of desk research and analysis:

Estimated number of working days: 255.

- **Man/days per profile:**

- Manager
- Coordinators
- Junior Consultant

- **Man/days per tasks:**

- Mapping exercise on researchers: manager 10 days, coordinator 20 days, junior consultant 45 days.
- Mapping exercise collaborations: manager 10 days, coordinator 20 days, junior consultant 45 days.
- Identification of policy strategies: managers 10 days, coordinator 20 days + up to 15 days of missions, junior consultant 10 days.
- Analysis, reporting and roadmap: manager 25 days, coordinator 15 days, junior consultant 10 days.

f) Period of the execution of the tasks

The execution of the tasks shall not exceed 5 months from 01/09/2013 until 28/02/2014.

g) Deliverables

The Contractor will be requested to attend the following meetings in Brussels² and to submit the deliverables indicated below:

D1. Preparatory Meeting and Planning:

Within 2 weeks from the signature of the specific contract a one day preparatory meeting will be organised in Brussels to discuss the detailed planning of the project especially in relation to the missions. The contractor will submit³ a draft of the planning at least 2 days before the meeting. The final version of the planning taking into account the comments and opinions shared during the preparatory meeting shall be delivered within 1 week from the meeting.

D2. Interim Report and Meeting

An interim report of 10-20 pages giving an overview of the execution of the project shall be delivered within 12 weeks from the signature of the contract. In week 11 a half day meeting will be organised in Brussels to present the execution of the tasks. A draft of the Interim Report shall be submitted at least 2 days before the meeting. The final version of the Interim Report taking into account the comments and opinions shared during the meeting shall be delivered within 1 week from the meeting.

D3. Final Report and Meeting

As a result of the overall process, the contractor will submit in week 20 a Final Report (between 50 and 100 pages) presenting an analysis of the 9 pre-selected countries and will suggest a road-map for the geographic expansion of the EURAXESS Links initiative during the period 2016-2020. In week 19 a one day meeting will be organised in Brussels to present the Report. A draft of the Final Report shall be submitted at least 7 days before the meeting. The Final Report taking into account the comments and opinions shared during the meeting shall be delivered within 1 week from the meeting.

II. PRICE and PAYMENTS

The Contractor shall send an offer in compliance with the Framework Service Contract (FWC) RTD-L05-2010 Impact Assessment and in particular with the Financial Proposal dated 14/07/2010 which is part of Annex II (Contractor's Offer) to the Framework Contract.

² All meeting will be organised at DG RTD premises in Brussels, Square Orban n.8.

³ All correspondence will use the functional mailbox _____

III. CONTENT OF THE CONTRACTOR'S OFFER

According to article I.4.1 of the Framework Contract this requests for services is placed on the basis of specific contracts attached to the Framework Contract as Annex III. Within 10 working days of sending the Contractor a request of services, the Commission is to receive an estimation of the resources to be allocated with particulars in support.

Under no circumstances the overall budget for this project may exceed 209.000 EUR.

The Commission is to receive a offer by 05/08/2013 at 5 pm.

HEAD of UNIT RTD.B2