

OPEN CALL FOR TENDERS

Reference No EACEA/2009/05

Clustering Erasmus Mundus Masters Courses and Attractiveness Projects

- Lot 1: Sustainability**
- Lot 2: Employability**
- Lot 3: Recognition of Degrees and Joint Degrees**
- Lot 4: Regional Clusters**
- Lot 5: Thematic Clusters**

TENDER SPECIFICATIONS

Contents

1.	INTRODUCTION	4
1.1.	General information	4
1.2.	Management of the call for tender	4
1.3.	Duration of the contracts and starting date of the activities	4
2.	GENERAL TERMS AND CONDITIONS APPLICABLE TO CALLS FOR TENDER	5
2.1.	Tenders	5
2.2.	Payments	6
2.3.	Guarantee for Pre-financing	7
2.4.	Penalties	7
2.5.	Period of validity of tenders	7
2.6.	Price	7
2.7.	Lots	8
2.8.	Conflict of interests	8
2.9.	Joint tenders	9
2.10.	Sub-contracting	9
2.11.	Publication	9
2.12.	Contact point	9
3.	TECHNICAL SPECIFICATIONS	9
3.1.	Background information	9
3.2.	Contract objectives and expected results	11
3.2.1.	Objectives	11
3.2.2.	Results to be achieved by the contractors	11
3.3.	Scope of the work	12
3.3.1.	Project description	12
3.3.2.	Geographical area to be covered	12
3.3.3.	Target groups	12
3.4.	Specific activities	12
3.5.	Logistics and timing	18
3.5.1.	Commencement date & period of execution	18
3.5.2.	Contract management, Meetings with the Agency and the Commission	19
3.5.3.	Results and deliverables (N = starting date of activities)	20
3.6.	Budget	20

3.7.	Requirements	20
3.7.1.	Personnel and key experts.....	20
3.7.2.	Facilities to be provided by the contractor	21
3.8.	Reports	21
3.8.1.	Reporting requirements	21
3.8.2.	Initial report	21
3.8.3.	Interim report	21
3.8.4.	Final report.....	22
4.	EVALUATION AND AWARD OF THE CONTRACT	23
4.1.	Exclusion Criteria	23
4.2.	Selection Criteria.....	24
4.2.1.	Professional capacity	24
4.2.2.	Economic & financial capacity	24
4.2.3.	Technical capacity	24
4.3.	Award Criteria.....	25
4.3.1.	Technical evaluation (100 points)	25
4.3.2.	Financial evaluation (100 points).....	26
4.4.	Award of the contract	26
5.	GENERAL CONDITIONS FOR THE AWARD OF THE CONTRACT	26
5.1.	Contract.....	26
5.2.	No obligation to award the contract	27

Annex 1:	Model Contract (for information)
Annex 2:	Information concerning the Tenderer/Sub-contractor
Annex 3:	Certification with respect to the Exclusion Criteria
Annex 4:	Price and Estimated Budget Breakdown
Annex 5:	Minimum requirements for the organisation of the workshops and assumptions for the estimation of travel costs of participants and speakers

OPEN CALL FOR TENDERS

EACEA 2009/05*Clustering Erasmus Mundus Masters Courses and Attractiveness Projects***1. INTRODUCTION****1.1. General information**

On 20 April 2009, the Commission adopted Decision 2009/36/EC amending Commission Decision 2005/56/EC setting up the Education, Audiovisual and Culture Executive Agency for the management of Community action in the fields of education, audiovisual and culture (hereinafter referred to as "the Agency"), and extending its scope of action to the Erasmus Mundus 2009-2013 programme. Its mission is to implement a number of strands of more than 15 Community funded programmes and actions in the fields of education and training, active citizenship, youth, audiovisual and culture. The Agency is in charge of most management aspects of the programmes, including drawing up calls for proposals, selecting projects and signing project agreements, financial management, monitoring of projects (intermediate reports, final reports); communication with beneficiaries; and on the spot controls. The Agency has its own legal identity and is located in Brussels.

The Agency wishes to conclude 5 service contracts for the organisation of projects bringing together Erasmus Mundus Masters Courses and Erasmus Mundus Attractiveness. In the framework of the contracts 5 "clusters projects" will be organised around the following themes: Sustainability (Lot 1), Employability (Lot 2), Degree recognition and joint degrees (Lot 3), Regional clusters (Lot 4) and Thematic clusters (Lot 5).

The services required are described in detail in section 3 of these tender specifications. Tenderers are free to submit a tender for one, several, or all lots.

1.2. Management of the call for tender

This call for tenders is managed by the Agency in cooperation with the European Commission. The Agency shall establish a Steering Committee, comprising representatives of both the Agency and the Commission, for the purposes of managing the contracts, reviewing progress with the contractors, providing guidance, and accepting the services and products. A member of the Steering Committee at the Agency will be nominated as the primary contact point for all official correspondence.

The ownership of the products and deliverables shall be vested in the Commission.

1.3. Duration of the contracts and starting date of the activities

In the framework of this Call for Tenders one contract will be awarded for each of the five lots covered by this call. The duration of the respective contracts and the starting date of the activities are as follows:

Lot 1: 12 months, activities starting immediately after the contract signature (expected early 2010)

- Lot 2: 12 months, activities starting 3 months after the contract signature
Lot 3: 12 months, activities starting 6 months after the contract signature
Lot 4: 12 months, activities starting 9 months after the contract signature
Lot 5: 12 months, activities starting 12 months after the contract signature

The Agency reserves the right to make use of a negotiated procedure without prior publication of a contract notice for additional contracts involving services similar to those assigned to the parties awarded an initial contract by the Agency. That procedure may be used only during the three years following conclusion of the original contract.

2. GENERAL TERMS AND CONDITIONS APPLICABLE TO CALLS FOR TENDER

2.1. Tenders

Tenders must include all information and documentation required to enable the Agency to appraise tenders in accordance with the criteria set out in section 4.

All documents submitted by tenderers will become the property of the Agency and are to be deemed confidential.

Expenses incurred in preparing and submitting tenders shall not be reimbursed by the Agency.

The submission of a tender in response to a call for tenders issued by the Agency entails:

- (a) acceptance of the terms and conditions set out in this invitation to tender, in the specifications and in the model contract (see Annex 1), where appropriate,
- (b) waiver of the tenderer's own general or specific terms and conditions; the tender submitted is binding on the tenderer to whom the contract is awarded for the duration of the contract.

Tenders must be:

- (c) submitted in triplicate: one clearly identified 'Original', and two copies marked 'Copy 1' and 'Copy 2' respectively. 'Copy 2' should be unbound.
- (d) accompanied by the forms in Annexes 2 to 4, filled in and signed by the tenderer;
- (e) accompanied by a covering letter signed by the tenderer or its duly authorised agent;
- (f) perfectly legible in order to rule out any doubt whatsoever concerning the words or figures;
- (g) submitted inside two sealed envelopes; the inner envelope addressed to the department indicated in the call for tenders, should be marked:

**Call for tenders
Reference No EACEA/2009/05.
For the attention of Unit – R2**

**"Not to be opened by the internal mail department/ à ne pas ouvrir par le
service courrier"**

Self-adhesive envelopes shall be sealed with adhesive tape and the tenderer shall sign across this tape.

Tenderers may choose:

- 1) to submit tenders either by post or by courier service; in this case, tenders must be dispatched no later than the final date specified in the covering letter to this call for tenders (proof of dispatch is constituted by the postmark or the date of the deposit slip) to the following address:

Education, Audiovisual and Culture Executive Agency (EACEA)
Unit R2
Office: BOU2 1/08
Ref. EACEA/2009/05
Avenue du Bourget 1
B-1140 Brussels
Belgium

- 2) to deliver tenders by hand to the following address:

European Commission
EACEA
For the attention of Unit R2
Ref. EACEA/2009/05
Office: BOU2 1/08
Avenue du Bourget, 1
B-1140 Brussels

no later than 16.00 on the final date specified in the covering letter. In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the central mail department who took delivery. This department is open from 08.00 to 17.00 from Monday to Thursday and from 08.00 to 16.00 on Friday; it is closed on Saturdays, Sundays and specified Commission holidays.

IMPORTANT: Please note the following important distinction between these two options for the submission of tenders:

A tender sent by post or courier service (option 1 above) must be posted no later than the final date shown in the covering letter. This means that the tenderer must post the tender on or before that date and that it may reach the Agency after that date, depending on how long the postal service takes to process the delivery.

By contrast, a tender delivered by hand to the Agency (option 2 above) must be delivered no later than the final date shown in the covering letter. This means that the tender must reach the Agency on or before that date.

In either case, it is the tenderer's responsibility to ensure compliance with the rules applying to the option that the applicant has chosen for the submission of the tender.

2.2. Payments

Payments will be made as follows (Article I.4 of the Model Contract):

Pre-financing: after the signature of the contract by the last contracting party, a pre-financing payment of an amount equal to 30% of the total amount of the

contract shall be made within 30 days of receipt by the Agency of a relevant invoice.

Interim payment: following acceptance of the interim report by the Agency, an interim payment of 40% shall be made within 30 days of receipt of the relevant invoice.

Payment of the balance: following completion of the tasks and approval by the Agency and, where appropriate, receipt of any document required under this tender including the final report, payment of the balance of the contract shall be made within 30 days of receipt of the relevant invoice by the Agency.

2.3. Guarantee for Pre-financing

A financial guarantee is automatically required if the pre-financing amounts to at least EUR 150 000.

Where required the contractors shall provide a financial guarantee in the form of a bank guarantee or equivalent supplied by a bank or an authorised financial institution (guarantor) equal to the pre-financing under the contract.

2.4. Penalties

If a contractor fails to perform its obligations under the contract within the time specified in Article I.2. of the Model Contract, then, without prejudice to the Contractor's actual or potential liability incurred in relation to the contract or to the Agency's right to terminate the contract, the Agency may decide to impose liquidated damages of 0.2% of the amount specified in Article I.3 of the Model Contract per calendar day of delay.

2.5. Period of validity of tenders

Tenders shall be valid for nine months from the final date for the receipt of tenders.

2.6. Price

The Agency awards contracts and makes payments in euro. Tenders must accordingly be expressed in euro. Tenders expressed in currencies other than the euro will be eliminated.

For tenderers in countries which do not belong to the euro zone, the price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an exchange rate and assume the risks or the benefits deriving from any variation.

Prices must be clearly indicated and show all pricing elements and unit costs. They must be fixed and inclusive of all costs (project management, quality control, training of contractor's employees, back-up resources, etc.) and expenses (management of the organisation, secretariat, social security, salaries, travel and office expenses, etc.) directly or indirectly connected with the provision of the service. All prices must be quoted exclusive of all taxes and dues.

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the Communities are exempt from all taxes and dues, including Value Added Tax (VAT), and accordingly these charges may not form part of the price of the tender. The amount of VAT should be shown separately.

In signing and submitting a tender, the tenderer or, in the case of consortia consisting of two or more firms, each member of the consortium, certifies on behalf of their firm that:

- the prices indicated in the tender have been fixed independently, without any consultation or communication on any of the points relating to the price with another tenderer or competitor;
- unless the law stipulates otherwise, the prices indicated in the tender have not been and will not be voluntarily communicated by the tenderer to any other tenderer or competitor, directly or indirectly, before the tenders are opened;
- the tenderer has not attempted and will not attempt to induce other persons to submit a tender or to dissuade them from doing so with a view to restricting competition.

2.7. Lots

The tender is divided into 5 Lots. Any tenderers may submit tenders for any number of Lots.

Tenderers shall submit a separate tender for each Lot for which they are tendering. They may indicate any price reduction they are prepared to grant in the event of being awarded a contract either for all the Lots or for a specified group of Lots. To this end, each tender must contain a stated total price (1) for each individual Lot covered by the bid and (2) for every combination of Lots covered by the bid, in case the Tenderer should be awarded the contract for several Lots.

Any tender submitted for a particular Lot must cover all the work required for that Lot. Bids for only a part of a Lot will not be accepted.

2.8. Conflict of interests

Tenderers should declare:

- that they do not have any conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties, or any other relevant connection or shared interest;
- that they will inform the Agency, without delay, of any situation constituting a conflict of interest or which could give rise to a conflict of interest;
- that they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- that they have not granted and will not grant, have not attempted and will not attempt to obtain, and have not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to the award of the contract.

The Agency reserves the right to check the above information.

2.9. Joint tenders

Joint tenders or tenders from consortia will be accepted. The nature and organisation of such tenders is at the discretion of the tenderers. A leader must be clearly identified and appointed by all other members of the consortium.

In any event, such tenders will be treated no differently from any other type of tender, each being assessed on its own merits in relation to the evaluation and award criteria contained in these specifications.

2.10. Sub-contracting

Any intention to subcontract part of the contract must be clearly stated in the tender. Tenderers must indicate clearly in their offer which parts of the work will be sub-contracted, and the identity of all sub-contractors undertaking more than 10% of the work by value. Full details of such sub-contractors must also be given. In any case, the main contractor retains sole responsibility for the contract.

2.11. Publication

Rights concerning the reports and those relating to their reproduction and publication will remain the property of the European Commission. No document based, in whole or in part, upon the work undertaken in the context of the contracts awarded following this call for tender may be published without the prior formal written approval of the Agency.

2.12. Contact point

The only contact point that may be used during the submission period, is the one indicated in the covering letter to this call for tenders. Tenderers are requested to put any questions in writing and to send them to the contact person by fax, e-mail or mail. **For legal reasons, queries by telephone cannot be taken into consideration.**

Queries concerning the administrative procedures will be treated individually. If the reply to a question is of general interest, it will be communicated simultaneously to all tenderers and be published on the EACEA Website.

3. TECHNICAL SPECIFICATIONS

3.1. Background information

The Erasmus Mundus 2009-2013 programme aims to promote European higher education, to help improve and enhance the career prospects of students and to promote intercultural understanding through cooperation with third countries, in accordance with EU external policy objectives, in order to contribute to the sustainable development of third countries in the field of higher education.

The programme's specific objectives are:

- to promote structured cooperation between higher education institutions and an offer of enhanced quality in higher education with a distinct European added value, attractive both within the European Union and beyond its borders, with a view to creating centres of excellence;
- to contribute to the mutual enrichment of societies by developing the qualifications of women/men so that they possess appropriate skills, particularly as regards the labour market, and are open-minded and

internationally experienced, and by promoting mobility for the most talented students and academics from third countries to obtain qualifications and/or experience in the European Union and mobility for the most talented European students and academics towards third countries;

- to contribute towards the development of human resources and the international cooperation capacity of higher education institutions in third countries through increased mobility streams between the European Union and third countries;
- to improve accessibility and enhance the profile and visibility of European higher education in the world as well as its attractiveness for third-country nationals and citizens of the European Union.

Erasmus Mundus provides a response to the challenges of globalisation faced by European higher education today, in particular the need to adapt education systems to the demands of the knowledge society, to enhance the attractiveness and visibility of European higher education worldwide and to stimulate the process of compatibility and comparability of degree structures across Europe. These themes are central to current national reform processes in higher education taking place in Member States. In addition, it provides an important vehicle for the promotion of intercultural dialogue between the European Union and the rest of the world.

The Erasmus Mundus programme comprises three actions:

- Action 1: Joint Programmes at Masters (Action 1 A) and Doctorate (Action 1 B) levels and award of individual scholarships/fellowships to participate in these programmes;
- Action 2: Erasmus Mundus Partnerships (former Erasmus Mundus External Cooperation Window);
- Action 3: Promotion of European Higher Education.

The second phase of the Erasmus Mundus Programme builds on its first phase (2004-2008). The first phase comprised the following activities:

- Erasmus Mundus Masters Courses (Action 1) with scholarships for non-European students and scholars (Action 2) and Partnerships with third-country institutions, including mobility grants for European students and scholars (Action 3);
- Projects enhancing the visibility, the accessibility and the attractiveness of European Higher Education (Action 4).

Under the programme a total of 103 Erasmus Mundus Masters Courses were selected for a period of 5 years (making for 5 Masters Course editions). All 103 courses are currently operating. They cover a wide range of academic disciplines and many are interdisciplinary in nature. In addition, a total number of 54 Attractiveness Projects were selected under the first phase, covering a large variety of topics such as promotion of specific academic disciplines or specific European regions as a study destination, quality assurance, access to European higher education, etc.

For more information on the results of the first phase of the programme, please consult the following online compendia:

Masters Courses:

http://ec.europa.eu/education/programmes/mundus/projects/comp08_en.pdf

Attractiveness Projects:

http://ec.europa.eu/education/programmes/mundus/projects/action4/comp08_en.pdf

3.2. Contract objectives and expected results

3.2.1. Objectives

The overall objective of the contracts is to disseminate and exploit the results of the Erasmus Mundus programme by bringing together Erasmus Mundus Masters Courses and Attractiveness Projects and drawing from their experience through surveys and workshops.

The synergies between different Masters Courses, as well as between Masters Courses and Attractiveness Projects, need to be better exploited. Bringing them together should lead to the identification and dissemination of good practice through a process in which Erasmus Mundus beneficiaries learn from each other by exchanging their experiences. Input will not only be sought from Erasmus Mundus beneficiaries, but also from relevant stakeholders and external experts

3.2.2. Results to be achieved by the contractors

The concrete results to be achieved for each of the 5 lots are as follows:

- a survey;
- a workshop;
- a handbook containing easily-usable guidelines on good practice;
- the setting up of a dedicated thematic section on the "Erasmus Mundus Excellence" website.

Co-ordinators of each Lot should plan for three common meetings in Brussels with the Agency and the Commission to discuss the development of these items.

The workshops will be attended by representatives from Erasmus Mundus Masters Courses and Attractiveness Projects ("project representatives"). The average participation in the workshops will be about 40 project representatives and the duration of a workshop should be a maximum of 2 days. The selection of the different Erasmus Mundus projects that will be invited for each of the workshops will be made between the Contractor for each Lot, the Agency and the Commission. This concerns both project representatives who are invited to present their good practices and the project representatives that will be invited as participants to the workshop to share their experiences.

The aim will be to ensure as large a coverage as possible among Erasmus Mundus Masters Courses and Attractiveness Projects. Each Masters Course and Attractiveness Project should participate in at least one workshop. Attractiveness Projects whose funding period has ended can also be invited. In all workshops, an active participation of Masters Courses and Attractiveness Projects is expected through the sharing of their practices and experience.

3.3. Scope of the work

3.3.1. Project description

The services covered by the contracts to be awarded pursuant to the present call for tender constitute a coherent set of inter-related measures designed to further disseminate and exploit the results of the Erasmus Mundus programme.

To be effective, the services will need to be carried out in an efficient and closely co-ordinated manner by one or more organisations with a solid operating base, in-depth awareness of higher education issues both in Europe and beyond, expertise in a range of competence areas such as developing and processing questionnaires, logistics of organising meetings, website development, methodologies of further training, and high-quality document production.

3.3.2. Geographical area to be covered

The surveys, the handbooks and the website activities should be prepared at the Contractors' premises. The workshops must be organised in Brussels.

3.3.3. Target groups

The main target group of the activities to be covered by the contract are the co-ordinators and partners of Erasmus Mundus Masters Courses and Erasmus Mundus Attractiveness Projects.

3.4. Specific activities

The following activities, leading to the deliverables indicated in each case, will be required from the Contractor selected for providing the services covered by the present call for tenders.

LOT 1 SUSTAINABILITY

Sustainability is an increasingly important issue in Erasmus Mundus. Under the Erasmus Mundus 2009-2013 programme applicants for Erasmus Mundus Masters Courses and Joint Doctoral Programmes have to present their sustainability strategies with a view to ensuring the continuation of their cooperation activities beyond the period of European Community funding. Their sustainability plan is part of the award criteria. As from the fifth edition of the course onwards, the number of available scholarships offered to Erasmus Mundus Masters Courses will be progressively reduced.

Under this Lot the following activities must be carried out:

- (A) A survey on sustainability among existing Erasmus Mundus Masters Courses. The survey will consist of the following activities: design of a questionnaire (A.1), carrying out of the survey (A.2) and processing and analysing of the survey results, leading to a survey report (A.3). Tenderers' bids should include an outline of the survey.
- (B) The organisation of a workshop that will be attended by a total number of 40 participants that are representatives of selected Erasmus Mundus Masters Courses and relevant Erasmus Mundus Attractiveness Projects and, if appropriate, representatives of the Erasmus Mundus Students and Alumni Association (EMA). During the workshop, the survey results will be presented and specific issues and examples of good practice will be identified. Apart

from the active participation of Erasmus Mundus project representatives, relevant external experts must be invited and case examples of industry involvement and involvement of other stakeholders presented. The final agenda of the workshop will be determined by the Agency and the Commission in close contact with the Contractor.

The Contractor will be responsible for all the logistics relating to the workshop, including the reimbursement of the travel and accommodation costs of participants and external speakers. An outline of the workshop and the related costing should be included in Tenderers' bids. The maximum workshop duration should be 2 days.

The minimum requirements for the workshop as well as further details on the reimbursement of travels costs are specified in Annex 5.

- (C) The production of a set of practical guidelines on sustainability of Erasmus Mundus Masters Courses, designed for easy use by co-ordinators and partners of all such courses. The guidelines should contain relevant examples of good practice.
- (D) The development of a dedicated thematic section on "Sustainability" on the "Erasmus Mundus Excellence" website.

Tenderers should describe in detail how they intend to approach these activities, how they will ensure the use and maintenance of the outputs produced under (C) and (D) above and how they will ensure that they have at their disposal the necessary expertise in organising workshops, in carrying out surveys, in producing guidelines and in the tasks related to the website.

LOT 2 EMPLOYABILITY

The employability of students graduating from Erasmus Mundus Masters Courses and of fellows leaving Erasmus Mundus Joint Doctorates with a PhD degree is key to the success of the Erasmus Mundus programme. This is the reason why the Erasmus Mundus Programme Guide specifies that Masters Courses should ensure their academic content meets relevant professional needs, contributing to the transfer of knowledge and skills, offering complementary skills courses and/or secondment/placement possibilities. Joint Doctoral Programmes are expected to explicitly address the issue of employability. They should provide appropriate professional career development opportunities beyond academia, towards a wider employment market, and provide appropriate incentives for candidates from developing countries to return home and exploit their experience for the benefit of their country. "Brain circulation" will be one of the topics to be addressed by this cluster.

Under this Lot the following activities must be carried out:

- (A) A survey among existing Erasmus Mundus Masters Courses on their activities with regard to the employability of their students and among members of the Erasmus Mundus Students and Alumni Association (EMA). The survey will consist of the following activities: design of a questionnaire (A.1), carrying out of the survey (A.2) and processing and analysing of the survey results, leading to a survey report (A.3). Tenderers' bids should include an outline of the survey.
- (B) The organisation of a workshop that will be attended by representatives of selected Erasmus Mundus Masters Courses and relevant Erasmus Mundus

Attractiveness Projects. During the workshop, the survey results will be presented and specific issues and examples of good practice will be identified. Apart from the active participation of Erasmus Mundus project representatives, relevant external experts must be invited: these could include representatives from potential employers of Erasmus Mundus students and alumni (industry, international organisations, NGOs), from employer organisations, from the European Institute for Technology and from the University-Business Forum¹. In addition, a limited number of Erasmus Mundus alumni who can refer to their personal experiences must be invited, as well as the service provider of EMA, ICUnet, which is responsible for carrying out a graduate impact survey among alumni. The final agenda of the workshop will be determined by the Agency and the Commission in close contact with the Contractor.

The Contractor will be responsible for all the logistics relating to the workshop, including the reimbursement of the travel and accommodation costs of participants and external speakers. An outline of the workshop and the related costing should be included in Tenderers' bids. The maximum workshop duration should be 2 days.

The minimum requirements for the workshop as well as further details on the reimbursement of travels costs are specified in Annex5.

- (C) The production of a set of practical guidelines on activities supporting the employability of Erasmus Mundus Masters students and alumni, designed for easy use by co-ordinators and partners of all such courses. The guidelines should contain relevant examples of good practice.
- (D) The development of a dedicated thematic section on "Employability" on the "Erasmus Mundus Excellence" website.

Tenderers should describe in detail how they intend to approach these activities, how they will ensure the use and maintenance of the outputs produced under (C) and (D) above and how they will ensure that they have at their disposal the necessary expertise in organising workshops, in carrying out surveys, in producing guidelines and in the tasks related to the website.

LOT 3 RECOGNITION OF DEGREES AND JOINT DEGREES
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Under the new Erasmus Mundus programme joint degrees of Masters and Doctoral Programmes are being promoted. Recognition of joint degrees is a challenge for the responsible authorities as the degrees have to be recognised under different higher education systems each having their own rules on recognition. Prior to the recognition of a degree an accreditation process assessing the academic quality of the programme usually takes place.

More generally, the Erasmus Mundus Programme Guide stresses the importance of quality assurance, which is part of the award criteria for both the Masters Courses and the Joint Doctoral Programmes. Both in 2008 and in 2009 a Quality Assurance exercise has been carried out on behalf of the European Commission, which has led to a handbook on Quality in Erasmus Mundus Masters Courses².

¹ http://ec.europa.eu/education/higher-education/doc1261_en.htm

² http://ec.europa.eu/education/erasmus-mundus/doc/handbook_en.pdf

Complementarities with the work carried out under this project should be sought and duplication avoided. In addition, many Erasmus Mundus National Structures have gathered information on recognition of joint degrees in their country. Their research should also be taken into account.

Under this Lot the following activities must be carried out:

- (A) A survey among existing Erasmus Mundus Masters Courses regarding the accreditation process and the difficulties encountered in the recognition of joint degrees. The survey will consist of the following activities: design of a questionnaire (A.1), carrying out of the survey (A.2) and processing and analysing of the survey results, leading to a survey report (A.3). Tenderers' bids should include an outline of the survey.
- (B) The organisation of a workshop that will be attended by representatives of selected Erasmus Mundus Masters Courses and relevant Erasmus Mundus Attractiveness Projects. The workshop should provide: good practice examples of Erasmus Mundus Masters Courses with a joint degree; contributions from Attractiveness Projects; inputs by national accreditation and/or quality assurance agencies (European and third-country); inputs relating to disciplinary approaches towards accreditation/quality assurance (e.g. engineering, music education, chemistry, public administration); involvement of the Erasmus Mundus Students and Alumni Association (student perspective); involvement of European and third-country representatives of industry and private companies (employers' perspective); and input from the Erasmus Mundus Quality Assurance exercise. The final agenda of the workshop will be determined by the Agency and the Commission in close contact with the Contractor.

The Contractor will be responsible for all the logistics relating to the workshop, including the reimbursement of the travel and accommodation costs of participants and external speakers. An outline of the workshop and the related costing should be included in Tenderers' bids. The maximum workshop duration should be 2 days.

The minimum requirements for the workshop as well as further details on the reimbursement of travels costs are specified in Annex 5.

- (C) The production of a set of practical guidelines on activities supporting the recognition of (joint) degrees offered by Erasmus Mundus Masters Courses, designed for easy use by co-ordinators and partners of all such courses. The guidelines should contain relevant examples of good practice.
- (D) The development of a dedicated thematic section on "Recognition of Degrees and Joint Degrees" on the "Erasmus Mundus Excellence" website.

Tenderers should describe in detail how they intend to approach these activities, how they will ensure the use and maintenance of the outputs produced under (C) and (D) above and how they will ensure that they have at their disposal the necessary expertise in organising workshops, in carrying out surveys, in producing guidelines and in the tasks related to the website.

LOT 4 REGIONAL CLUSTERS

As its name suggests, the Erasmus Mundus programme has a worldwide focus. All higher education institutions around the world can participate in the

programme, while scholarships and fellowships are available for students throughout the world.

Regional clusters will focus on bringing together existing Erasmus Mundus Masters Courses and Attractiveness Projects with a focus on the same region of the world as well as relevant Erasmus Mundus External Cooperation Window Partnerships. Although Erasmus Mundus Masters Courses are open to students worldwide, some have relatively large student populations from certain world regions as a consequence of factors such as the thematic area, the language of instruction or traditional links between countries where the universities offering the Masters Course are located and a certain region or country. Furthermore, certain Masters Courses make particular efforts to attract students from a specific region or specific countries. A number of Attractiveness Projects also have a specific regional focus.

Under this Lot one regional cluster will be organised that will focus either on Africa, Latin America or Asia. The geographical area on which the regional cluster will focus must be made explicit in Tenderers' bids. There is a possibility that further regional clusters will be funded in the future that will focus on geographical regions not covered by this first cluster. Consideration should also be given to possibilities for synergies between Erasmus Mundus Masters Courses and Attractiveness Projects on the one hand and projects selected under other geographically-specific Community programmes (Asia-Link for Asia, Alfa/Alban for Latin America and Edu-Link for the African, Caribbean and Pacific (ACP) countries).

Under this Lot the following activities must be carried out:

- (A) A survey among selected Erasmus Mundus Masters Courses and Attractiveness Projects which should lead to an inventory of regionally focussed activities carried out by the projects in question. The Masters Courses and Attractiveness Projects will be selected according to the region concerned by the contract. The survey will consist of the following activities: design of a questionnaire (A.1), carrying out of the survey (A.2) and processing and analysing of the survey results, leading to a survey report (A.3). Tenderers' bids should include an outline of the survey.
- (B) The organisation of a workshop that will be attended by representatives of selected Erasmus Mundus Masters Courses and relevant Erasmus Mundus Attractiveness Projects. The workshop should provide good practice examples of regionally focussed activities of Masters Courses and Attractiveness Projects and should deal with a variety of issues focussing on the regional dimension, such as the sustainability of Masters Courses and employability of Erasmus Mundus students and alumni, promotion, education/industry cooperation, research cooperation and "brain circulation". Further inputs to the workshops should be given by relevant stakeholders such as regional university associations and policy-makers from some of the main countries of the targeted region, as well as Erasmus Mundus alumni representing a relevant EMA Chapter³. Relevant Commission Delegations should also be invited. The final agenda of the workshop will be determined by the Agency and the Commission in close contact with the Contractor and will be adapted in order to be relevant for the region concerned.

³ EMA Chapters are regional subdivisions of EMA. More information on the Chapters will be provided to the Contractor by the EACEA and the Commission.

The Contractor will be responsible for all the logistics relating to the workshop, including the reimbursement of the travel and accommodation costs of participants and external speakers. An outline of the workshop and the related costing should be included in Tenderers' bids. The maximum workshop duration should be 2 days.

The minimum requirements for the workshop as well as further details on the reimbursement of travels costs are specified in Annex 5.

- (C) The production of a set of practical guidelines for Erasmus Mundus Masters Courses and Attractiveness Projects, designed for easy use by co-ordinators and partners of all such courses and projects. The guidelines should contain relevant examples of good practice.
- (D) The development of a dedicated thematic section on "Regional Clusters" on the "Erasmus Mundus Excellence" website.

Tenderers should describe in detail how they intend to approach these activities, how they will ensure the use and maintenance of the outputs produced under (C) and (D) above and how they will ensure that they have at their disposal the necessary expertise in organising workshops, in carrying out surveys, in producing guidelines and in the tasks related to the website.

LOT 5 THEMATIC CLUSTERS

Many Erasmus Mundus Masters Courses exist in the same, or similar, disciplinary/thematic fields. However, there has been little in the way of networking or the development of synergies between them. Under this Lot Erasmus Mundus Masters Courses should be brought together that cover the same thematic area, along with relevant Attractiveness Projects. Clusters might also be organised around the thematic priorities defined for the Knowledge and Information Communities to be selected by the European Institute for Technology (EIT) in 2009, which concern "climate change mitigation and adaptation", "sustainable energy" and "the future information and communication society". The theme on which the cluster will focus must be made explicit in Tenderers' bids. There is a possibility that further thematic clusters will be funded in the future that will focus on themes not covered by this first cluster.

Under this Lot the following activities must be carried out:

- (A) A survey among relevant Erasmus Mundus Masters Courses and Attractiveness Projects, leading to an inventory of activities carried out by these projects in relation to the topic of the thematic cluster. The survey will consist of the following activities: design of a questionnaire (A.1), carrying out of the survey (A.2) and processing and analysing of the survey results, leading to a survey report (A.3). Tenderers' bids should include an outline of the survey.
- (B) The organisation of a workshop that will be attended by representatives of relevant Erasmus Mundus Masters Courses and Attractiveness Projects. The workshop should cover topics such as accreditation, sustainability, education/industry cooperation, promotion, links between Erasmus Mundus Masters Courses and the research community, employability and international research cooperation. Input to the workshops will come from the experiences of Erasmus Mundus Masters Courses and Attractiveness Projects (including International Thematic Networks). Further input will be given by other relevant stakeholders, such as the EIT and Erasmus Mundus alumni. The final agenda

of the workshop will be determined by the Agency and the Commission in close contact with the Contractor.

The Contractor will be responsible for all the logistics relating to the workshop, including the reimbursement of the travel and accommodation costs of participants and external speakers. An outline of the workshop and the related costing should be included in Tenderers' bids. The maximum workshop duration should be 2 days.

The minimum requirements for the workshop as well as further details on the reimbursement of travels costs are specified in Annex 5.

- (C) The production of a set of practical guidelines for Erasmus Mundus Masters Courses and Attractiveness Projects, designed for easy use by co-ordinators and partners of all such courses and projects. The guidelines should contain relevant examples of good practice.
- (D) The development of a dedicated thematic section on "Thematic Clusters" on the "Erasmus Mundus Excellence" website.

Tenderers should describe in detail how they intend to approach these activities, how they will ensure the use and maintenance of the outputs produced under (C) and (D) above and how they will ensure that they have at their disposal the necessary expertise in organising workshops, in carrying out surveys, in producing guidelines and in the tasks related to the website.

3.5. Logistics and timing

Unless otherwise stated, the provisions on Location, Timing and Budget contained in this section will operate at the level of each contract awarded pursuant to the present call for tender.

The cost of the Contractor's participation in the meetings with the Agency and the Commission, indicated in the timetables below, must be provided for in the price submitted in the tender.

In principle, three meetings will be held with the Agency and the Commission for each of the Lots: a kick off meeting, a second inception meeting and a final meeting.

In the case where a Tenderer intends to apply for more than one Lot, the meetings concerned will as far as possible cover more than one Lot.

3.5.1. Commencement date & period of execution

The indicative commencement date of activities depends on the Lot. The overall period of execution of the activities for each of the Lots will be 12 months with the starting date of activities being different for each of the Lots.

The following dates are foreseen for contract signature, starting date of activities and duration of the contract:

Lot	Signature date	Starting date of activities	Duration of the contract
Lot 1	Early 2010	Signature date	12 months
Lot 2	Idem	Signature date + 3 months	12 months
Lot 3	Idem	Signature date + 6 months	12 months
Lot 4	Idem	Signature date + 9 months	12 months
Lot 5	Idem	Signature date + 12 months	12 months

Certain results are deliverable at various stages during the contract period, as indicated in Section 3.5.3 below, and the duration of the contract(s) will reflect this accordingly.

3.5.2. Contract management, Meetings with the Agency and the Commission

The following timetable will apply to the reporting on all 5 Lots (N represents the starting date of the activities of the Lot concerned):

Deadline (N + months)	Activity (all Lots)
N + 1	Submission of initial report
N + 2	Inception meeting with the Agency and the Commission
N + 5	Interim report
N + 5	Co-ordination meeting with the Agency and the Commission
N + 9	Submission of draft final report
N + 10	Discussion of draft final report with the Agency and the Commission
N + 11	Submission of final report and summary, taking account of the Agency's and the Commission's comments

3.5.3. Results and deliverables (N = starting date of activities)

Ref.	Description of deliverable (all 5 Lots)	Timetable (N + months)
A.1	Draft questionnaire for the survey	N + 2
A.2	Carrying out of the survey	N + 3
A.3	Results of the survey	N + 5
D	Tasks related to website	N + 6
B	Workshop	N + 8
C	Guidelines on good practice	N + 9

3.6. Budget

The indicative budget range for the Lots which comprise the services to be provided pursuant to the present call for tender, is as follows:

LOT 1	LOT 2	LOT 3	LOT 4	LOT 5	TOTAL
170,000 – 200,000	170,000 – 200,000	170,000 – 200,000	170,000 – 200,000	170,000 – 200,000	Max 1,000,000

3.7. Requirements

3.7.1. Personnel and key experts

Tenderers are free to propose any allocation of resources which they believe will best achieve the desired results. The staff input for each of the activities described above and for general co-ordination must be specified and carefully justified in the tender.

Collectively, the team proposed by each Tenderer must possess all of the following qualifications, skills and professional experience:

- competence in the design and implementation of surveys, questionnaires and structured interviewing; skills in processing and analysing data;
- excellent project planning, resource management and co-ordination skills resulting from several years' experience of handling major international projects;
- experience in the organisation of multilateral conferences;
- excellent oral and written communication skills;
- skills in the building and management of international project teams;
- linguistic skills (English, other languages);

- strong inter-cultural awareness;
- technical expertise in the areas of web-development and document design.

It is not necessary that each of the profiles correspond to a single individual. One expert may have the skills and experience required to cover more than one role in the project. Equally, one role may be divided between two or more experts if the tenderer believes that this will be the most effective way to achieve the desired results.

3.7.2. Facilities to be provided by the contractor

The Contractor shall ensure that experts are adequately supported and equipped. In particular, the Contractor shall ensure that there is sufficient administrative, secretarial, translation and interpreting provision, as necessary, to enable experts to concentrate on their primary responsibilities.

3.8. Reports

3.8.1. Reporting requirements

Six copies of each report must be submitted to the Agency in printed form and by e-mail. Electronic files must be in Microsoft ® Word for Windows format. The timetable for submission of the reports is set out in section 3.5.2 above.

Tenderers' attention is drawn to the further details on each report in sections 3.8.2 to 3.8.4 below, including the period within which the Agency and the Commission will comment on all reports. In the absence of such observations within the deadlines specified, the report will be considered as being approved.

Within 15 days of receiving the Agency's and the Commission's observations, the Contractor must submit the report in definitive form, taking full account of these observations, either by following them precisely, or by explaining clearly why they cannot be followed. If the Agency still considers the report unacceptable, the Contractor will be invited to amend the report until the Agency and the Commission are satisfied.

3.8.2. Initial report

The initial report must be submitted within 30 calendar days of the date of entry into force of the contract. The Agency and the Commission will comment on this report within 20 calendar days of its receipt.

The initial report should confirm the methodology proposed by the Contractor for each of the activities covered, the detailed timing for the completion of the deliverables and the members of the project team.

3.8.3. Interim report

The interim report for each of the Lots has to be submitted in accordance with the deadline indicated in section 3.5.2 above. The Agency will approve or reject the report within 45 days of their receipt in each case. Approval or rejection of the report will be preceded by comments on the report by the Agency and the Commission. The Contractor shall have 30 days in which to submit additional information or a new report.

The interim report must, as a minimum:

- provide complete information about the work carried out on the relevant activities during the period in question, as specified in section 3.4 above;
- indicate any difficulties which may have been encountered in adhering to the timetable set out in section 3.5.3 above;
- identify any key questions for discussion with the Agency and the Commission;
- contain a preview of the following phase of work, including any proposals for modifying the methodological approach and/or timing envisaged.

The interim report for each Lot will provide the main basis for dialogue between the Contractor, the Agency and the Commission regarding the implementation of the various activities and the issues arising.

3.8.4. Final report

The draft final report must be submitted after the number of months following the starting date of activities specified in section 3.5.3 above. The Agency will approve or reject the report within 45 days of its receipt. Approval or rejection of the report will be preceded by comments on the report by the Agency and the Commission. The Contractor shall have 30 days in which to submit additional information or a new report.

The report must be clear and comprehensive, and must consist as a minimum of the following components:

- *Executive summary*. In English, French and German, this summary will set out, in no more than 5 pages, the main activities conducted and the concrete outputs to which they have given rise.
- *Main report*. This must contain a description of the activities conducted, the results of the surveys, the questionnaire for the survey, any indications of impact of which the Contractor is aware and recommendations for future follow-up work in the area addressed by the contract. The selected Contractor will be provided with further details about the structure of the main part of the draft final report by the Agency.
- *Technical annexes*. These must include the Technical specifications of the lot concerned, questionnaire templates, any additional tables or graphics, references and sources, technical specifications and copies of the products produced during the project (notably the practical guidelines and the dedicated web section on the "Erasmus Mundus Excellence" website).

The report must enable the reader to gain a clear understanding of:

- the purpose of the contract;
- exactly what activities were carried out during the contract;
- how the activities were designed and conducted;
- to what experience and outcomes the activities have given rise;
- what conclusions can be drawn on the basis of these activities;
- what substantive recommendations, in particular for any future continuation and, if necessary, extension of the activities, are being made on the basis of these experiences;
- what the outcome of the internal and, if applicable, external evaluation of the activities has been;

- how the Contractor would recommend disseminating and sustaining the outcomes of the work accomplished.

4. EVALUATION AND AWARD OF THE CONTRACT

The evaluation will be based on the information provided by the tenderer in the tender submitted in reply to this call.

In addition, the Agency reserves the right to use any other information from public or specialist sources. All the information will be assessed in the light of the criteria set out in these specifications.

The evaluation will proceed in stages, as described below. Only the tenders meeting the requirements of each stage will pass on to the next stage of the evaluation. The final stage involves the award of the contract.

The stages of the evaluation procedure will be as follows:

- Exclusion of tenderers;
- Selection of tenderers;
- Evaluation of tenders on the basis of the award criteria:
 - Technical evaluation;
 - Financial evaluation.
- Award of the contract.

4.1. Exclusion Criteria

Tenderers must certify that they are not in one of the situations referred to in Articles 93 and 94 of the Financial Regulation. To this end, tenderers shall provide a declaration on their honour, duly signed and dated, stating that they are **not** in one of the situations listed below:

- (a) they are bankrupt or being wound up, having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- (c) they have been guilty of grave professional misconduct proven by any means which the Agency can justify;
- (d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Agency or those of the country where the contract is to be performed;
- (e) they are guilty of misrepresentation in supplying the information required by the authorising department;
- (f) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- (g) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

For joint tenders (consortia), each member of the consortium must submit the required documents. The exclusion criteria will be applied to each of the members of the group individually, and to the group as a whole.

The tenderer to whom the contract is to be awarded must provide, within the time limit stipulated by the Agency and preceding the signature of the contract, the evidence confirming the declaration referred to in the first paragraph. Examples of documents accepted as evidence may be found at the following address:

http://ec.europa.eu/internal_market/publicprocurement/2004_18/index_en.htm

4.2. Selection Criteria

4.2.1. Professional capacity

In order to assess the professional capacity of the tenderer the following information must be supplied:

- company name;
- date of foundation of company;
- copy of articles of association;
- enrolment in trade register;
- VAT number;
- company's activities;
- composition of the board of directors;
- certificate dated less than 90 days previously, issued by the competent authority of the tenderer's country showing that it has fulfilled all obligations concerning the payment of tax and social security contributions.

In the case of a consortium, all partners must provide the information required.

4.2.2. Economic & financial capacity

In order to assess the financial capacity of the tenderer, the following information must be supplied:

- balance sheets and profit and loss accounts for the last two years;

In the case of a consortium, all partners must provide the information required.

4.2.3. Technical capacity

In order to assess the technical capacity of the tenderer, the following information must be supplied:

Experience, qualifications and professional experience of the tenderer's full-time personnel:

- a) indicate the tenderer's total full-time staff numbers;
- b) list of personnel capable of performing the tasks described in point 3 of this tender specifications, stating their experience, skills and knowledge of languages, and enclosing their CVs;
- c) presentation of other relevant information to illustrate the skills and experience of the personnel available to perform the tasks described in this call for

tenders, demonstrating that they possess the technical abilities needed to provide the service as well as the appropriate language skills;

Possession of the necessary skills and at least three years' experience of direct relevance to the activities concerned or provision of the services and products covered by this call for tenders. The tenderer should provide:

- a) examples of other work similar to the services and products covered by this call for tenders, indicating how the same type of work has been carried out in the past. If only part of the work has been carried out as principal tenderer, specify how the other part was sub-contracted;
- b) a list of the customers for whom the tenderer has worked in the last three years.

Description of the measures employed to ensure the quality of services, and a description of the firm's study and research facilities;

If sub-contracting: indicate the share that the candidate may intend to subcontract, with the references of the proposed subcontractors and their agreement in writing.

In the case of a consortium, each partner must provide the information required.

4.3. Award Criteria

The contract will be awarded to the Tenderer submitting the bid offering the best value for money, on the basis of the following criteria, to be applied at the level of each Lot:

4.3.1. Technical evaluation (100 points)

		Weight
1.	<i>Understanding of the subject and the purpose and requirements of the services to be provided</i>	10 points
2.	<i>Quality, feasibility and relevance of the proposed approach for the various services specified, namely:</i> Survey: <ul style="list-style-type: none"> • The thoroughness and pertinence of the outline proposed for the survey • The pertinence and the quality of the methodology proposed for the design, processing and analysis of the questionnaires Workshop: <ul style="list-style-type: none"> • Sensitivity to needs and constraints, and effectiveness of organisational methods proposed regarding the workshop • The thoroughness and pertinence of the outline proposed for the workshop, including the role and profile of the external experts • The appropriateness of the logistical organisation of the workshop, including arrangements for organising the travel and accommodation for participants and external speakers Practical guidelines : <ul style="list-style-type: none"> • The pertinence and the quality of the proposed methodology for the practical guidelines 	60 points

	Website : <ul style="list-style-type: none"> • The appropriateness of the proposed web-design • The pertinence of the proposed methodology for the sustainability of the website in the long term 	
3.	<i>Relevance of the profiles in the team, quality of the work plan and organisational arrangements, to be assessed in terms of the following:</i> <ul style="list-style-type: none"> • Relevance, feasibility and credibility of the work plan; • Soundness of project co-ordination arrangements; • Soundness of resource allocation principles; • Composition of the team: appropriateness of the profiles proposed for their specified role and tasks within the project, including external experts, and their organisation as a team; • Quality assurance, including any internal and/or external evaluation envisaged. 	30 points

These criteria are equally valid for the 5 Lots. All bids will be assessed against the award criteria in the light of the specificities of each of the 5 Lots.

Tenders scoring at least 70 out of 100 points and scoring at least 50% of the points available for each criterion will be classified as technically acceptable and will be submitted to financial evaluation.

4.3.2. Financial evaluation (100 points)

The lowest-priced tender will receive the maximum number of points (100). The remaining acceptable offers will receive a number of points corresponding to the ratio between the price of their offer and that of the lowest acceptable offer, according to the following formula:

$$(\text{lowest-price tender}/\text{price of the tender in question}) \times 100$$

Tenderers who are bidding for several Lots must indicate clearly in their tender the price for all the combinations of Lots for which they are bidding.

4.4. Award of the contract

The contract will be awarded to the tenderer offering the best price/performance ratio. This will be achieved by multiplying:

- the result of the evaluation of the qualitative criteria by 0.5;
- the result of the evaluation of the price by 0.5.

The two results will be added together and the contract will be awarded to the tender obtaining the highest score at the end of this process.

5. GENERAL CONDITIONS FOR THE AWARD OF THE CONTRACT

5.1. Contract

The contracts shall take the form of a service contract based on the model contract annexed to these specifications, amended and completed on the basis of the selected tender(s) to which the general terms and conditions set out in the

enclosed model contract shall apply. The contracts shall be signed by the authorised representatives of the Agency and the tenderer.

In the case of a consortium, each contract shall be signed by the leader of the consortium in the name of all the consortium's members. Each member of the consortium must sign a mandate acknowledging the signature of the contract by the consortium leader.

5.2. No obligation to award the contract

Initiation of a tendering procedure imposes no obligation on the Agency to award the contract.

The Agency reserves the right to award a contract for only some of the Lots which form part of this call for tender.

The Agency shall not be liable for any compensation with respect to Tenderers whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.