

**TERMS OF REFERENCE**

Feasibility study for the pilot project “ERASMUS for journalists”

**(under the Framework Contract SMART 2007/0035)**

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## 1. CONTEXT AND AIMS OF THE ASSIGNMENT

### *2.1 Background*

This feasibility study for a pilot project is being launched following a request from the European Parliament (through the EP resolution on the budget of the EU for 2010). It proposes the creation of a programme "*ERASMUS for journalists*".

It is anticipated that a pilot project on a mobility scheme could enhance the training of journalists, particularly young journalists, within the European Union. The main goal of the proposed pilot project is to enable journalists of different countries and media to gain a broader and more comprehensive understanding of the European Union and its different media and cultures. Such an exchange programme could, in the European Parliament's view, help journalists to gain new experience and knowledge of the European Union, to improve their knowledge of media pluralism in different Member States and help the exchange of good practice on common themes between journalists of different nationalities.

Mobility and peer learning are key factors in the transfer of knowledge and good practice, and would enhance the effectiveness of the journalists' work. The proposed project will ensure that experience is exchanged and reinforced at European level for the benefit of better journalism. Such practices could contribute to the emergence of a more European focus in the media. The purpose of this study is to provide an ex ante evaluation of the feasibility of the proposed pilot project in year n+2 and a scaled-up programme in year n+4, following an ex post evaluation of the pilot.

### *2.2 Legal references*

In the EU's budget for 2010, the European Parliament proposed a preparatory action (09 06 05) and allocated a budget for it with the aim of preparing in due course a pilot project called "*Erasmus for journalists*". The Parliament expressed the wish that this project should contribute to the creation of truly European media. One of the ways to achieve this goal is to offer journalists the possibility of mobility, through exchanges of journalists between different countries and media within the European Union.

The preparatory action has its legal base in Article 49(6) of Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities (OJ L 248, 16.9.2002, p. 1), as amended by Regulation (EC, Euratom) No 1995/2006 (OJ L 390, 30.12.2006, p. 1).

### *2.3 Description of the planned pilot project*

The beneficiaries of the proposed pilot project should be journalists working for EU publications and electronic media, particularly young journalists from different countries and media within the European Union. The participants would benefit from exchanging experience with other journalists in other European Union's Member States and upon returning home, they could disseminate this new experience through the media of their home countries.

The mobility scheme would provide participating journalists with peer-learning opportunities abroad and working as part of the editorial staff of media bodies based in other countries. The objective of the mobility scheme would be for journalists to learn from each other, benefiting from the experience of people facing similar challenges in journalism, particularly in media environments with different traditions of media pluralism.

Both the visits and the collaboration foreseen among journalists from different cultures should aim at promoting the transfer of "good practice" and "good policies" in journalism between Member States of the European Union. Exchange of experience on successes or difficulties in journalism and in sustaining media pluralism would be part of the proposed scheme. The journalists would be encouraged to establish partnerships, thus enhancing the European dimension of journalism.

More specifically, the mobility scheme could potentially include the following objectives. To:

- Foster peer learning of journalism in other member states of the European Union;
- Exchange experience with journalist of other nationalities who are facing similar obstacles and challenges;
- Facilitate the search for potential partners for European collaboration;
- Provide possibility to learn how to manage and successfully address various issues of journalism and media pluralism in editorial staffs in other Member States;
- Ensure that journalists, by means of developing in-depth knowledge and experience through exchanges, collaboration and working sessions, improve their abilities in the domain of journalism.

#### *2.4 Description of the exploratory study*

The exploratory study shall test the underlying intervention logic and define implementation rules for a possible "Erasmus for journalists" programme. The output shall constitute original analysis, rather than being a mere assembly of secondary sources; and it shall be fit for the purposes described in this terms of reference; it shall take the already on-going Erasmus programmes into account in order to learn from their experiences and avoid any duplication and may propose alternatives. The study shall consist of two parts.

##### Part 1

The first part of the study to be carried out should deal with the following broad issues:

- Testing overall feasibility of the pilot project given timeframe and organisational setting, notably the intervention logic. The Commission intends to have the programme implemented by an external service provider.
- Provide the results of consultations of stakeholders participating in focus groups to show the needs of potential participants and of the needs of organisations hosting the mobility scheme.
- Provide a budgetary estimate with regards to different forms of mobility and participation
- Provide the Commission with the documentation needed in order to launch the implementation of the pilot project (application forms, guidelines and information material including process flow-charts, a guide for applicants).
- Propose a feasible system of reporting.

In order to make these issues operational the following tasks have to be tackled in the study:

### *Task 1*

The contractor should assess and test the underlying intervention logic of the Parliament's proposal in respect of the outcomes foreseen and advice on whether exchanges of journalists between countries would achieve the objectives sought by the European Parliament. It should evaluate the policy objectives sought by the proposal and determine the main framework conditions for its implementation. The concept should be consistent with other policy goals and activities.

### *Task 2*

The study should elaborate an implementation scheme including recommendations on how a pilot project could be implemented by a professional organisation as an external service provider and how the pilot project could be scaled up later into a larger programme. Regarding the implementation of the programme, in order to achieve effective, low-risk implementation with indicative results, the following list of fundamental questions needs to be addressed and answered as a minimum. The answers should cover participation by journalists from all media types (print/TV/Radio/Online).

### **Questions:**

Intervention logic:

- Is there an interest from journalists to visit peer editorial staffs in other Member States?
- Are journalists ready to devote time for such visits and collaboration? And how much time? A week or couple of weeks or an even longer time?
- What duration should be envisaged for visits in order to test the approach in a pilot implementation and achieve impacts in a full programme? Which range of durations would be acceptable in order to achieve impacts rather than mere output activity?
- Is there an interest and will from editorial boards in other member states to welcome such representatives for a certain time?
- Is there an added-value of such visits from both a political and journalistic perspective?
- Would the approach be supported by publishers/media service providers?
- Would the approach proposed by the European Parliament achieve concrete benefits for media pluralism as analysed in the recent study undertaken on media pluralism indicators for the Commission?<sup>1</sup>

Implementation:

- How can the aims of the programme be implemented operationally in the most effective way?
- How to ensure that the budget is not spent on touristic visits which would not fulfil the intentions of the EP and could create reputational risk for the institutions?
- How would the scheme cope with language issues? Even if the visitors speak a main foreign language there might be communication problems during the everyday work particularly in the cases of "small language (visitor) - small language (host)" combinations.
- The study should address the issue of whether the proposed pilot programme should organise individual visits or address group visits as well.
- The study should suggest how to achieve a good balance through the implementing rules with respect to geographic, thematic, local/regional coverage.

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<sup>1</sup> [http://ec.europa.eu/information\\_society/media\\_taskforce/pluralism/study/index\\_en.htm](http://ec.europa.eu/information_society/media_taskforce/pluralism/study/index_en.htm)

- There is a need for a minimum quality assurance for participants' selection and for hosting institutions' selection. How to set these criteria?
- Are there some themes (e.g. certain editorial practices) which attract more attention from concerned participants, in the European context?
- Should participants undergo a pre-departure induction course/briefing before their visit including information on the mobility scheme, inter-cultural learning and relevant EU level information, such as the internal market, European law issues, EU institutions, etc?
- Who would be the beneficiaries of the Community funding? Ultimately, it would be journalists, but as it is not realistic/possible for the Commission to contract directly with individuals in a subsidy mode, should it be their employers (publishers)?
- Would it be more effective to channel funding through an intermediary organisation or organisations as in the Erasmus for Young Entrepreneurs initiative?

### *Task 3*

In order to facilitate the evaluation of the programme the study should provide detailed assessment methods to be used once the 1 year pilot project has been finished and is to be assessed. The proposed evaluation method should take into consideration the likely structure of the programme, and it must be relatively simple, efficient and reliable.

### *Task 4*

Due to the very high number of tasks to be accomplished, there is an important resource implication. Therefore, the level of the budget is particularly important, both for establishing proof of concept during the pilot and for the putative programme. A key question is the level of funding needed to achieve impacts during the main programme. The budgeting should include the estimated costs of the management framework during both the pilot project and when scaled up into the main programme phases. The underlying methodologies used for such estimates should be explained in detail. The evaluation of the potential costs should include such items as a) personnel and overhead costs of the management organisation, b) grants for journalist, c) possible financial support for the host institution, d) managing website and other communication activities, e) other items.

### *Task 5*

A wide range of communication related issues has also to be analysed. In addition to general awareness raising and dissemination activities, the development of a website, including a database will be also needed. The study should elaborate these requirements. The website should enable to carry out the following tasks as a minimum: a) advertise the opportunity for study visits and the selection and evaluation process; b) "matching" of partners; c) provide a database tool for peer-contacting, taking into account linguistic abilities; d) set the format for final reports on study visits, etc.

### *Task 6*

The launching of this pilot project and subsequent full programme may include various types of potential risks and risk areas which the study should systematically identify and then carefully analyse and then provide some potential solutions or alternative ways to avoid them.

The implementation proposal, together with the suggested comprehensive evaluation of the pilot project and the budgetary issues, should provide the basis for a document addressed to the European Parliament concerning the putative rationale for the mainstreaming of the programme.

## Part two

The elaboration of the programme and its successful implementation will depend very much on having a good understanding of the current state of journalism and the media sector in Europe across Member States. Achieving this requires a systematic analysis based on statistical evidence. Therefore, the contractor should also collect statistical data that would (1) support its proposals in the context of the present study and (2) help any external management body to run the programme, and (3) help the Commission in its supervision of this entity. The statistical data should demonstrate the recent development of the media sector and the situation of journalists. These data should reveal the prevailing conditions of various types of challenges generated by the on-going technical development of ICT and the rapidly spreading use of internet as well as the adverse effects of the global economic and financial crisis on the media sector. The statistical data should also contribute to the mapping the main features of the media and journalists regarding their understanding of the European Union and its different media and cultures.

In order to be able to find answers and elaborate alternative proposals the contractor should gather and process statistical data and other relevant information about the media industry, potential participants of the programme (i.e. journalists, editorial boards, professional institutions, European institutes, etc.). This part of the study should comprise these statistical data and related analysis. The statistical database to be developed should include mainly proprietary data (i.e. gathered and processed by the contractor) and it may include few data only from known statistical data sources (e.g. Eurostat, World Magazine Trends, World Press Trends of WAP, Audiovisual Observatory, etc.). The statistical data base should include short time series and snapshot data.

Time series and snapshot data should serve to show the current situation of media and demonstrate the impacts of the economic crisis affecting the media. The data collection should concentrate on the following areas:

- a) the professional situation of journalists;
- b) the current economic and business position of the media market;
- c) the main trends in European media;
- d) evidence of how far there is a comprehensive understanding of the EU and its different media and cultures among journalists.

The proposal should include a description of the detailed list of those statistical data which will be delivered. The description should explain the relevance, type, methodology of data collecting and/or processing, the availability and other important features of these statistical data. The evaluation of the proposals submitted to the pilot action and ultimately the programme will significantly depend on this information.

The contractor should prepare a written evaluation based on this statistical database regarding the issues mentioned above.

As a minimum, this work should cover a representative sample of Member States to be defined and justified in the offer. Full coverage of all EU Member States would be preferable if it were considered feasible by the contractor and developed in the offer.

## **2. STUDY PROCESS**

### *3.1 Timing of the study process*

The process of preparing the study should include the following phases:

- An initial meeting with the Commission and the Steering group in Brussels (kick-off meeting) and follow-up meetings as appropriate. Meetings should also take place with stakeholders (i.e. journalists, publishers, editors, associations, etc.) to present and discuss the interim report and final report.
- Gather information and make an analysis on existing mobility support (Erasmus programmes).
- Prepare reports on the experience of comparable existing programmes, including those offered by private foundations, opinion and interest of stakeholders, gathered statistical information. The objective is to get the points of view of those who are potential visitors (journalists) and hosts (all types of media companies) in as many Member States as possible and to discuss with them the different variants of the planned action.
- Provide an estimate of the costs that each alternative may imply.
- Make proposals concerning the design of the pilot project in terms of objectives, target group, length of the stay abroad, financial support scheme (individual grants, project grants, flat rates, etc.) and its implication and its management structure. The latter should be done by testing different scenarios.
- Elaborate a reporting and proposal evaluation system, using for instance flow charts.
- Identify the factors that constitute an obstacle for hosting journalists to participate in the pilot programme and develop measures that would help to overcome those obstacles and enhance the participation of host media firms.
- Statistical work as described in part two above.

### *3.2. Reporting and deliverables*

Each report will be submitted in electronic format and in 4 hardcopies in English. The reports and all other documents have to be submitted electronically either in MS Word or pdf format. The Commission will comment on interim reports and on the final report within 15 working days. In the absence of observation from the Commission within the deadline, the report will be considered as being approved.

### *3.3. Inception report*

On the basis of a kick-off meeting of the Steering Group the Inception Report of at least 10 pages will be submitted 3 weeks after the final signature of the contract. It will describe the methodology and procedure applied, in particular the instruments and tools used to do the consultation, etc. It will provide a detailed description of the organisation of the project and a detailed, updated work plan and timetable.

### *3.4. Interim report (1<sup>st</sup> part)*

The Interim report (preliminary version of the final report) will contain an overview of the work carried out during the first phase of the study. It should at least include the following:

- Complete information on progress achieved in fulfilment of the tasks to be carried out as specified in 2.4;
- Problems encountered, solutions found or proposed, and impact on future work;
- Strengths and weaknesses of the alternative scenarios that could be recommended on how to organise efficiently mobility of journalists;
- Detailed time schedule and methodology for the completion of the work.

The Interim report shall be submitted by the end of month 4 after the date of signature of the contract. The Interim report will be discussed with the Commission at a check point meeting



taking place after the submission of the report. Within 10 days of receiving the Commission's observations, the Contractor will submit the report in a definitive form, taking full account of these observations.

### *3.5 Final Report (1<sup>st</sup> and 2<sup>nd</sup> phases)*

#### Part 1 final report

The Contractor will produce a part 1 draft final report based on its findings (existing mobility schemes in the EU, consultation with stakeholders, various reports, etc.). Part 1 of the draft final study report shall be submitted by the 6<sup>th</sup> month following the date of signature of the contract by the last of the two parties. The final report should describe the methodology and organisation of the work and activities that have been done. It should represent the main results, outcomes, conclusions and recommendations. It should also summarise some key outcomes of the study.

The above report will also include the inputs necessary for the preparation of the call for tender to select the external service provider that will manage the pilot project. The contribution will mainly consist of identifying the tasks and reports that the external service provider has to deliver. Finally, the Contractor will draft guidelines that can be addressed to and used by journalists and hosting media companies that are interested in participating in the pilot programme.

After reception of the draft version of the report and its annexes, the Commission will within 10 working days inform the Contractor of the acceptance of these documents, or will pass on its observations. Within 10 days of receiving the Commission's final observations, the Contractor will submit the final versions of the report in definitive form, either taking account of these observations or setting out different arguments. The draft version of the guidelines for journalists and host media companies have to be submitted by the middle of month 7.

#### Part 2 final report

Part 2 of the study (statistical database and analysis) has to be submitted by the end of the 11 month after the date of signature of the contract. After reception of the draft version of the Part 2 of the report, the Commission will within 10 working days inform the Contractor of the acceptance of these documents, or will pass on its observations. Within 10 days of receiving the Commission's final observations, the Contractor will submit the final versions of the report in definitive form, either taking account of these observations or setting out different arguments. The consolidated versions of all documents of the final reports have to be submitted before the end of month 11 after the signature of the contract.

The consolidated versions of all final reports (two parts of the study, guidebooks, contribution to the drafting of the call for tender) should be together approximately 90-100 pages, of which approximately 10 pages of summary, plus an additional 80 to 100 statistical tables based on the data collection work.

### 3. ORGANISATION

The contract will be managed by DG INFSO unit A1. INFSO/A1 will set up a Steering Group composed of DG INFSO officials. The Steering Group will follow the activities undertaken, provide guidance on its execution and give opinions on its results. A staff member of INFSO/A1 will chair the Steering Group and its meetings.

Contact:

European Commission  
DG Information Society and Media  
*Directorate A - Audiovisual and Media Policies Unit (office BU33 3/35)*  
for the attention of **Jean-Eric de Cockborne**  
**1-3 Avenue du Bourget**  
B -1140 Brussels

### 4. DURATION

The duration of the tasks should not exceed 12 months.

### 5. LOGISTICS AND TIMETABLE

The study will be carried out at the Contractor's own offices. Unless agreed otherwise between the parties the meetings with the Commission and with the Steering Group will take in Brussels.

Activity time scale

<b>activities</b>	<b>time scale</b>
Kick-off meeting between Contractor and Commission (Steering Group)	1 <sup>st</sup> month
Preparation, discussion of the Inception report within 2 weeks after the kick-off meeting	2 <sup>nd</sup> month (beginning)
Delivery of Interim Report (preliminary version of the final report)	End of 4 <sup>th</sup> month
Interim meeting in Brussels	End of 5 <sup>th</sup> month
Stakeholders' meeting in Brussels - Presentation of Interim results	6 <sup>th</sup> month
Draft final report (Part 1) finalisation of research work and submission of the result within 2 weeks after the stakeholders meeting	End of 6 <sup>th</sup> month
Draft final report meeting - in Brussels	7 <sup>th</sup> month

Submission of draft guidelines for journalists and host media companies.	End of 7 <sup>th</sup> month
Draft final report (Part 2) - Finalisation of research and submission	End of 11 <sup>th</sup> month
Final report evaluation meeting in Brussels - Submission of the final consolidated report with all annexes within 2 weeks after the final meeting	12th month

## **6. PRICE**

The maximum price for this feasibility study is 500.000 EUR (including travel, excluding VAT/TVA).

## **7. GEOGRAPHICAL COVERAGE**

Part 1 should include the possibility of participants from all Member States. As a minimum, Part 2 should cover a representative sample of Member States.

## **8. AWARD OF THE CONTRACT**

The specific contract shall be awarded to the tender offering the best value for money, which will be the one with the best quality/price ratio, taking into account the award criteria listed in Annex II of the Framework Contract.