

Universities UK

Invitation to tender – UNIW-190210/424

GLOBAL WALES II

11 March 2019

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INVITATION TO TENDER

This specification invites tenders for a five year evaluation and monitoring study of the Global Wales II project being managed by Universities Wales. The aim of the study is to measure and assess the impact of Global Wales II targeted campaigns, throughout the duration of the three-year project and the two years after the project has concluded. This will be achieved by establishing an initial baseline and set of key performance indicators and conducting annual reviews against that baseline.

This ITT is available to download at www.uniswales.ac.uk, www.universitiesuk.ac.uk and www.sell2wales.gov.wales

UNIVERSITIES WALES

Universities Wales (Unis Wales) represents the interests of universities in Wales and is a National Council of Universities UK. Unis Wales's membership encompasses the Vice Chancellors of all the universities in Wales, and the Director of the Open University in Wales. Our mission is to support a university education system which transforms lives through the work Welsh universities do with the people and places of Wales and the wider world.

BACKGROUND

- 1 International and EU students studying at Welsh universities bring significant economic, social and cultural benefits to Wales, contributing around £500 million to the Welsh economy annually. Recognising this and the wider impact of universities' international research and partnership activity, the Welsh universities along with Welsh Government, British Council Wales and the Higher Education Funding Council for Wales (HEFCW) joined forces to launch 'Global Wales'.
- 2 Initiated and led by the sector via Universities Wales, Global Wales provides strategic support to universities in a small number of target markets. It was initially set up as a three-year pilot programme (2015-2018).
- 3 Following an extensive process of market research, the US and Vietnam were identified as priority markets. Work in the US mostly focused around profile raising to address Wales' relatively low market share of US students in the UK. Vietnam, a largely untapped opportunity market for Wales where the government is actively seeking international partners, called for an altogether different approach leveraging the entire Welsh higher education system for policy dialogue, partnership building and student and staff mobility.

- 4 The 'Study in Wales' brand, including Wales' presence at key international education conferences and exhibitions, is currently being managed through the Global Wales project.
- 5 From 2015-2018 the project operated on a budget of £45,000 per year, funded by equal financial contributions from Unis Wales, Welsh Government and British Council Wales. Some additional funds were leveraged through external funding sources e.g. GREAT campaign.
- 6 The Global Wales Board was convened to provide strategic direction to the partnership and to monitor the budget. Membership was comprised of senior representatives from each partner organisation, who met termly. The Board was chaired by the chair of the Universities Wales PVC International group.
- 7 In February 2018, all partners committed to a further three-year investment in the programme. With this commitment in place, Universities Wales submitted a bid for funding to the Welsh Government's EU Transition Fund ¹. The Transition Fund was introduced in January 2018 to help businesses, public services and other partner organisations plan for and mitigate the impacts of Brexit.
- 8 The bid focussed on the impact of international and EU students in Wales in terms of export earnings, job creation and supporting tourism. It made the case for increased investment in international recruitment and partnership activity to make Wales more attractive for trade and foreign direct investment (FDI).
- 9 Additionally, the case was made that Wales should remain a welcoming destination for international students and staff, as they contribute greatly to the social fabric of our campuses, towns and cities, and to Wales' longer-term strategic and diplomatic interests, boosting our soft power and expanding our networks across the globe.
- 10 The bid addressed the external factors affecting EU and international student recruitment. The UK leaving the EU could result in significant changes to the status of EU students, posing a significant risk to EU student recruitment, which would have a significant financial impact on Welsh universities and the Welsh economy.
- 11 Negative perceptions of the UK as being unwelcoming to international students, originally brought about by the removal of the post-study work visa in 2012, have been compounded by the Brexit debate. The promotion of Wales as an open, friendly and dynamic nation was deemed essential to ensure that it continues to be an attractive destination for all international students and researchers alike.

¹ <https://beta.gov.wales/sites/default/files/publications/2018-08/12-july-2018-transition-fund.pdf>

- 12 Funding of £3.5 million was accordingly awarded to the Global Wales project in July 2018 for a further three-year programme. Global Wales II would also promote Wales as a study destination, seek to diversify the international student body and capitalise on the growing demand for higher education globally, with core activity in the following areas:
- Development of current priority markets (Vietnam and USA);
 - Expansion to include new priority markets
 - A major reinvestment in a broader programme of activity for the “Study in Wales” brand at domestic, EU and international level
- 13 The bid proposed to deliver the following benefits:
- Increase Wales’ market share of the UK’s EU and international student recruitment from target markets
 - Diversify the international student body, making us less susceptible to fluctuations in individual markets
 - Increase the number of students from the rest of the UK choosing to study in Wales
 - Secure a return on investment for WG in terms of match funding, opportunities for business, partnerships, and exchange
 - Increase number of research and commercial partnerships with priority markets, creating further opportunities to attract investment to Wales
 - Boost Wales’ profile in key overseas markets and generate wider diplomatic and trade opportunities through dialogue with overseas governments
 - Increase Wales’ long-term soft power through increased student, staff and researcher exchanges between Wales and our priority markets
- 14 Investments made from the European Transition Fund were underpinned by the following design principles:
- Additional to ongoing activity already underway, leveraging additional resources where possible;
 - Additional to investments/compensation from the UK Government;
 - Strategic, well-founded and with clear potential to add value, supporting collaboration across sectors;
 - Wherever possible, distributed using existing Welsh Government funding channels with existing organisations active in the identified areas.
- 15 In order to effectively monitor and evaluate the impact of the Global Wales II project and its targeted campaigns, we are seeking an external consultant to establish a baseline, and success criteria against which future change and progress can subsequently be meaningfully measured and assessed. We would then expect annual reports against those criteria for a total of 5 years.

MONITORING AND EVALUATION PROJECT

Aims

- 16 The first aim of the monitoring and evaluation project is to establish a baseline, identifying the current situation in respect of international higher education in Wales and notably in Global Wales priority markets. A set of key performance indicators and tangible success criteria for the Global Wales II programme will also be required, for the short, medium and long term.
- 17 The second aim of the evaluation will be to regularly review and assess the impact of the Global Wales II programme over the next five years, in accordance with the success criteria.

Deliverables and Outcomes

- 18 The first deliverable will be an initial evaluation report of the current position in relation to international higher education in Wales to establish a baseline against which against which change and progress can be meaningfully measured.
- 19 The baseline report should be submitted in July 2019, and will identify key impact measurables such as:
 - International student numbers in Welsh universities – inward and outward
 - Welsh university partnerships and research relationships
 - Digital engagements
 - Additional sectors supported
 - Tourism figures – visitor numbers to Wales and their economic impact
 - Diplomatic contacts forged
 - Export earnings generated
 - Impact on employment and associated GVA
- 20 Subsequent reporting will seek to evaluate how the Global Wales II programme activities have delivered against its initially proposed outcomes and any additional outcomes.
- 21 The expectation would be for a total of four subsequent reports, with an in-depth review provided at the end of year three of the programme, two interim reviews at the end of years two and four, and a final impact report provided in Autumn 2023 - five years after the establishment of Global Wales II.
- 22 This monitoring and evaluation project will need to produce evidence of the impact of the programme on International higher education in Wales and its wider influence on associated sectors such as tourism, trade and industry. External factors affecting the programme, such as the geo-political context, will also need to be carefully factored into any analysis.

Proposed Project Timetable

Action	Date
Invitation to tender published	Monday 11 March 2019
Closing date and time for receipt of tender proposals	12 noon Thursday 4 April 2019
Review of tender submissions	w/c 8 April 2019
Appointment of contractors	Monday 15 April 2019
Project inception meeting between contractor and Global Wales project team	w/c 29 April 2019
Submission of detailed project plan	Friday 10 May 2019
Submission of Baseline Evaluation report	Friday 26 July 2019
Year 1 - Interim evaluation report	December 2019
Year 2 - Interim evaluation report	September 2020
Year 3 - End of Global Wales II programme - detailed evaluation report and impact assessment	September 2021
Year 4 - Interim evaluation report	September 2022
Year 5 - Final detailed evaluation and impact assessment	September 2023

Monitoring

- 23 Following the initial project inception meeting, we would anticipate a schedule of quarterly project meetings over the first 12 months of the project, to review progress and ensure the correct key impact measures have been identified to deliver required evidence of success against proposed outcomes.
- 24 Further monitoring measures would be reviewed according to the requirements of the ongoing project.

Budget

- 25 A budget of up to £120,000 (incl VAT) is available for this five year evaluation and monitoring study.

TENDER REQUIREMENTS

The tender proposal

- 26 Candidates should deliver a concise tender, focusing on the proposed work and budget. The tender should include information on the following:
- i. details of organisation including name, legal status, full contact details and lead contact;
 - ii. details or CVs of staff who will undertake the work and a clear break down of how much time each person will contribute to the project;
 - iii. details of other pieces of work that your organisation has delivered which are similar in focus, scope and tone to the project / activity;
 - iv. professional experience and expertise relevant to the project / activity including experience and expertise of working within the HE sector
 - v. any other details about yourself or your organisation you feel may be relevant
 - vi. a proposed approach/methodology to deliver the activity including:
 - a clear timetable for the work, key milestones and clear timescales for completing the project;
 - a schedule of all costs including a detailed breakdown of how costs will be allocated in terms of staff hours, travel, VAT etc;
 - details of any potential sensitivities involved in researching this area and how they will be managed;
 - details of how you will obtain a sufficiently high response rate from a wide and representative range of staff and students;
 - details of how you will work closely with Unis Wales/UUK and HEIs in Wales;
 - a risk assessment of your proposed approach and how you will mitigate any key risks;
 - conflicts of interest (as requested in paragraph 39 below)
 - a signed certificate of non-collusion and declaration, set out in the form given in **Appendix A** to this ITT
- 27 If the tender is submitted on behalf of a consortium, please:
- i. list the members of the consortium
 - ii. identify the lead member and a point of contact
- 28 If the tender contains a sub-contracting relationship please state:
- i. the main contractor and sub-contractors
 - ii. the nature of this relationship

Fees

- 29 The total amount available for this work, including all fees and expenses is £120,000 (including VAT). This includes all attendance fees, conference fees and expenses related to the project.

- 30 In calculating project overheads account should be taken of the fact that UUK is a registered educational charity and non-profit making body.
- 31 Our preference is to pay for the work in accordance with the delivery of the scheduled reports:
- Initial payment of 10% on signing the contract;
 - Interim payment of 15% on presentation of the initial evaluation report
 - Further interim payments of 15% on presentation of subsequent annual monitoring reports (60% in total)
 - Final payment of 15% on receipt of the year 5 evaluation report.
- 32 UUK wishes to agree a fixed price for the work.
- 33 UUK is not bound to accept the lowest priced tender and shall not be bound to accept the contractor as a sole supplier.

Selection criteria

- 34 In awarding the contract, UUK will consider the balance between the quality of the candidate's tender and value for money, taking account of the factors listed in this ITT and in particular the proposed methodology.
- 35 Each candidate's tender shall be assessed on the following:
- Relevant experience of the team, including publications and track record in managing credible and significant projects.
 - Understanding of the higher education sector.
 - Understanding of potential issues in researching international higher education in Wales, and identification of practical solutions to the challenges of the proposed project.
 - Appropriateness of the proposed methodology in terms of securing credible and robust information.
 - Feasibility of completing a practical programme of work to a high quality within the specified timetable.
 - Risk mitigation.
 - Overall value for money.

References

- 36 The name and contact details of two referees for whom the candidate has recently worked (within the past five years only) should be provided so that references can be taken up.

Timing

- 37 The time frame for the project is detailed in the Timetable provided at paragraph 16. The candidate should note the following key dates:
- Deadline for receipt of emailed tenders: Thursday 4th April 2019 at 12 noon
 - Deadline for receipt of hard copy tenders: Monday 8th April 2019 at 12 noon
 - Award of tender to successful candidate: Monday 15th April 2019
 - Delivery of Initial Evaluation project by 26th July 2019
 - Dates for subsequent reports are also detailed in the timetable at paragraph 16
- 38 The dates set out in this paragraph are provisional only and may be altered by UUK at its discretion.

Reporting responsibilities

- 39 The successful candidate will report to **Gwen Williams**, Head of International, Universities Wales

Conflict of interest

- 40 Details of the candidate's policy on handling conflicts of interest which may exist or arise regarding this engagement must be provided. In the event that a director, partner, employee or employee's representative of the candidate has an interest or connection in UUK, please provide that person's full name, position and the nature of the connection/interest in UUK.

Tender submission

- 41 Please return **one email copy and 3 hard copies** of your response (marked as below) in English to:

Tender documents enclosed – DO NOT OPEN - (ref. UNIW-190210/424)

Laura Fergusson
International Projects Officer
Universities Wales
2 Caspian Point
Caspian Way
Cardiff
CF10 4DQ

E-mail: l.fergusson@uniswales.ac.uk

- 42 **An email copy of tender documents should arrive no later than Thursday 4th April at 12 noon.**

- 43 UUK shall have the right to disqualify any candidates who submit incomplete or late tenders.

Contracting

- 44 This tender is being issued by UUK. Any contracts with the successful provider will be made with UUK. The form of contract that the successful candidate will be expected to enter into with UUK is enclosed with this ITT at **Appendix B**.

Further information

- 45 For further details, please contact Laura Fergusson on telephone 029 2044 8029 or l.fergusson@uniswales.ac.uk, who is also candidates' point of contact for any queries that you have relating to this ITT.
- 46 Any queries should clearly reference the appropriate paragraph in the documentation and, to the extent possible, should be aggregated rather than sent individually. The deadline for submitting queries is Monday 25th March 2019.
- 47 Universities Wales will respond to all reasonable requests for clarification of any aspect of this ITT and supporting documents as soon as it is reasonably possible. Please note that the response to your query shall be posted on our website (without naming your organisation), therefore your query should not contain any details which are confidential.
- 48 Please note that no pre-tender negotiations are permitted.

CONFIDENTIALITY STATEMENT AND DISCLAIMER

- 49 The information contained in this ITT and all other information made available at any time to the candidates by and on behalf of UUK in connection with the project is supplied on the basis that the candidates will keep such information confidential at all times and that such information will be used only for the purposes of participating in the bidding process.
- 50 No information contained in this ITT or any other written, oral or other information made available to the candidate shall form the basis of any warranty, representation or term of any contract by UUK with any third party.
- 51 UUK does not accept any responsibility or liability for the accuracy or completeness of the ITT or any other oral or written information provided by UUK to any candidate.
- 52 UUK reserves the right not to follow this ITT in any way and/or to withdraw from or amend the procurement process.

UUK RIGHTS TO CANCEL

- 53 UUK reserves the right, without prior notice and in its absolute discretion, to change or terminate the tendering procedure for the project at any time before signing the contract with the successful candidate.

Appendix A

Certificate of Non-Collusion and Declaration

I certify that:

- i. The prices in the Tender have been arrived at independently, without consultation, communication, agreement or understanding for the purpose of restricting competition, as to any matter relating to such prices, with any other Candidate or with any competitor.
- ii. Unless otherwise required by law, the prices which have been quoted in the Tender have not knowingly been disclosed by the Candidate, directly or indirectly, to any other Candidate or competitor, nor will they be so disclosed.
- iii. No attempt has been made or will be made by the Candidate to induce any other person or firm to submit or not to submit a Tender for the purpose of restricting competition.
- iv. No attempt has been made directly or indirectly to canvas any employee or adviser of UUK concerning the award of the contract which is the subject of this invitation to tender.
- v. I acknowledge that any price fixing or collusion with other Candidates in relation to the Project shall give UUK the right to exclude a Candidate from the procurement process and may constitute an offence.
- vi. I am authorised by the Candidate (and all relevant associated companies and organisations) to supply the information given in the Tender.
- vii. I declare that, at the date of signing this declaration, the information given is complete and accurate to the best of my knowledge having made reasonable enquiries.

Signed: _____

Name: _____

Date: _____

On behalf of: _____

Appendix B:

Contract for Consultancy Services

This contract is made this day of between:

[Name and address of organisation]

Hereinafter called

“the Contractor”

Universities UK, a company limited by guarantee, registered in England and Wales (No. 2517018)
Registered Charity No. 1001127

Woburn House

20 Tavistock Square

LONDON

WC1H 9HQ

Hereinafter called

“Universities UK”

- d. The Contractor will ensure that the data is processed fairly and surrounded by proper security.
- e. The Contractor will destroy any statistical and personal data supplied by Universities UK when and if required to do so by Universities UK and provide confirmation as to its destruction in such form as Universities UK may reasonably require.
- f. The Contractor will return any documentation supplied to it during the course of the contract by Universities UK for the purposes of carrying out the study.
- g. The Contractor is liable for any compensation in legal costs incurred by Universities UK from the loss and / or misuse, of data supplied to the Contractor.

7 Freedom of Information

If the Contractor receives a request under the Freedom of Information Act 2000 to disclose any information that, under this Agreement, is Universities UK's Confidential Information, it will notify Universities UK and will consult with Universities UK. Universities UK will respond to the Contractor within 10 days after receiving the Contractor's notice if that notice requests Universities UK to provide information to assist the Contractor to determine whether or not an exemption to the Freedom of Information Act applies to the information requested under that Act.

8. Business Ethics and Conflict of Interest and Warranty

The Contractor shall maintain the highest professional standards including those necessary to avoid any real or apparent impropriety or to prevent any action or conditions which could result in conflict with Universities UK's best interests.

The Contractor shall ensure that the information provided in the study shall be true and accurate in all material respects and shall otherwise comply with the study specification as set out in Universities UK's invitation to tender.

9. Liability

The advice or information given by the Contractor will not constitute an infringement of third party rights and the Contractor shall accordingly indemnify Universities UK against all costs, expenses and liabilities incurred in respect of any claim brought by a third party alleging infringement.

10. Timescale

The timescale for this contract is:

Date	Event
[All significant dates]	[All significant events/outputs]

All planned work will be completed by the Contractor in accordance with the timetable stated above and within the life of this contract. Time is agreed to be of the essence in relation to the Contractor's delivery of work in accordance with the timetable stated above.

The Contractor will provide such information as is required to enable Universities UK to monitor progress. The Contractor will provide all appropriate documentation to all members of the study's Steering Group at least five working days in advance of each Steering Group meeting.

11. Payment

The total fee for the contract will not exceed £..... inclusive of VAT and expenses.

The Contractor shall invoice Universities UK for the fee which will be paid in instalments:

- | | | |
|-----|--------------------------|--------------------|
| i. | [Details of instalments] | £ inclusive of VAT |
| ii. | | £ inclusive of VAT |

(To be included if the contractor is an individual, i.e. not a company or an institution) [The Contractor shall be exclusively responsible for the payment of National Insurance contributions and for the discharge of any income tax payable in respect of the fee, and shall pay any such contributions and taxes to the appropriate authorities.]

Invoices are to be sent to [Name] at Universities UK, Woburn House, 20 Tavistock Square, LONDON WC1H 9HQ. [Receipts will be submitted to support claims for reasonable expenses incurred].

12. Settlement Terms

Invoices are normally payable within thirty days of their receipt. Prices are fixed for the duration of the contract.

13. Termination

Universities UK may terminate the contract for any reason on giving twenty one days written notice.

Either party may terminate this agreement forthwith for any serious breach of contract by the other which is not remedied within seven days' written notification of the breach.

The provisions of clauses 5, 6, 7, 8 and 9 shall survive any termination of this contract.

14 Force Majeure

Neither party shall be deemed to be in breach of contract if failure to comply with the requirements of the contract is due to circumstances beyond their reasonable control.

15. Copyright and Intellectual Property

Copyright of written work produced in connection with the contract shall be vested in Universities UK.

Universities UK reserves the right to publish or not to publish, but, subject to the prior written approval of Universities UK, the Contractor will be able to make use of the material in other research but shall not be entitled to profit from the commercial exploitation of such material without agreeing appropriate royalties with Universities UK. The latter is conditional on the Contractor treating all information obtained during the course of the contract in strict confidence.

The Contractor may publish articles based on the final written report following its acceptance by the Steering Group and as approved in advance by Universities UK.

16. Publication of Final Report

The text and accompanying figures of the final report resulting from the contract must be provided by the Contractor in Universities UK house style conforming to a standard word processing format. The Contractor will be obliged to review and amend as necessary a final proof before any final report is printed.

Universities UK will be responsible for any publication of any final report resulting from the work undertaken by the Contractor and will take all final decisions on design and content.

Universities UK will receive the income from sales of any publication produced as a result of the contract and will provide the Contractor with [number] complimentary copies.

Universities UK will take all decisions on sponsorship of any final report resulting from the contract or any dissemination event.

17. General

The ruling law of contract law and of the relationship of the parties hereto arising out of it shall be English law. Both parties agree to submit to the jurisdiction of the English courts in respect of any matters arising out of or in connection with the contract.

The terms herein set out (together with the documents referred to in the first clause) constitutes the entire agreement between the parties hereto and supersedes all negotiations, representations or agreements either written or oral preceding the contract.

FOR: CONTRACTOR

FOR: Universities UK

BY:

BY:

[Name and position]

[Name and position]

DATE:

DATE: