

## **Invitation to Tender: Analysis of Academic Recognition for Higher Education Students Studying Abroad with the Erasmus+ Program**

### **1. Introduction**

This call for tenders regards an analysis of barriers to student recognition and challenges on reporting levels of recognition for higher education students studying abroad under the Erasmus+ Program's Key Action 1: Learning Mobility for Individuals.

The analysis is to focus on the following countries: Denmark, Estonia, Latvia, Poland and Sweden.

The purpose of the analysis is to provide the five Erasmus+ National Agencies (NAs) with solid background information on the matter for use in their national administration of the Erasmus+ Program and in their strategic communication to their institutions of higher education (HEIs).

The Danish National Agency (under the Danish Agency for Science and Higher Education) will be responsible for contracting a research firm to conduct a comprehensive analysis of barriers to student recognition for the five aforementioned countries and a final, brief comparative analysis of the recognition landscape in the five countries.

This call for tenders will be published on [www.udbud.dk](http://www.udbud.dk), a website that gathers all the Danish public call for tenders.

### **2. Annexes**

- Annex 1: Draft contract
- Annex 2: Learning Agreement – Student Mobility for Studies
- Annex 3: Participant Report Form – KA1 – Learning Mobility of Individuals – Student mobility for studies in higher education (call 2016)
- Annex 4: Participant Report Form – KA1 – Learning Mobility of Individuals – Student mobility for studies in higher education (call 2015)
- Annex 5: Survey on Recognition (call 2016)
- Annex 6: [Erasmus+ Program Guide 2014](#)
- Annex 7: [Erasmus+ Program Guide 2015](#)
- Annex 8: [Erasmus+ Program Guide 2016](#)
- Annex 9: [Erasmus Charter for Higher Education 2014 – 2020](#) (ECHE)
- Annex 10: [ECHE Annotated Guidelines](#)

### **3. Data Sources**

#### **Public data sources**

- [Erasmus+ Public Dashboard](#) (exists only in a beta version currently – expected to go public in the fall of 2018): will contain learning mobility overview; projects overview and data on program indicators (such as formal recognition)

#### Data sources available to the Erasmus+ NAs

- [Erasmus+ Dashboard](#) (ErasmusPlus.qvw) – data visualization tool with learning mobility overview, projects overview and data on program indicators (such as formal recognition)
- [Erasmus+ link](#) – NAs' Erasmus+ project management system, which includes a reporting element that can pull data on beneficiaries
- [Mobility Tool](#) (MT) – HEIs Erasmus+ project management system, where individual student mobilities are recorded for each granted project. Students' Participant Reports are available in MT. HEIs submit final reports with data including student recognition levels via MT. Data from the final reports is subsequently transferred to Erasmus+ link.

Danish Agency for Science and  
Higher Education

## 4. Background

Academic recognition – of competences and of learning outcomes – is one of the key objectives of the Erasmus+ Program, across all fields of education. The Erasmus+ Program Guide's introduction cites the need “to promote the emergence and raise awareness of a European lifelong learning area designed to complement policy reforms at national level and to support the modernisation of education and training systems, in particular through enhanced policy cooperation, *better use of EU transparency and recognition tools* and the dissemination of good practices” (PG 2018 pg. 25).

The E.U. Commission further specifies that one of the aims of a mobility project, the subject of this analysis, is to “ensure a better recognition of competences gained through the learning periods abroad” (PG 2018 pg.30). Participating organizations, in turn, are expected to “improve () processes of recognition and validation of competences gained during learning periods abroad” (PG 2018 pg. 28).

For HEIs, this recognition of competences amounts to the formal recognition of learning outcomes attained by the transfer of credits upon a higher education student's return from a period of study or internship abroad.<sup>1</sup>

This is ensured, in part, by the formulation of a so-called Learning Agreement, where “the sending and receiving organisations, together with the students/staff, must have agreed on the activities to be undertaken by the students ... prior to the start of the mobility period. These agreements define the target learning outcomes for the learning period abroad, specify the formal recognition provisions and list the rights and obligations of each party” (PG 2018 pg. 33).

Students are apprised in the Erasmus+ Student Charter, a set of guidelines for students detailing their rights and responsibilities, as well as those of the sending and

---

<sup>1</sup> One of the fundamental principles in the Erasmus Charter for Higher Education (ECHE) is accordingly “full recognition for satisfactorily completed activities of student mobility, and, where possible, traineeships in terms of credits awarded (ECTS or compatible system).” HEIs participating in E+ must be ECHE holders.

receiving organization, that full recognition is the goal: “in accordance with your Learning Agreement, you are entitled to receive full academic recognition from your sending institution for activities you have completed satisfactorily during your mobility period” (pg. 3)

Accordingly, students are asked to report on whether they obtained full recognition for each individual mobility when they submit their participant report, and institutions are asked to report on the “number of recognized credits or equivalent units” in their final reporting in Mobility Tool.

In line with this goal on the individual level, the E.U. Commission has stated that it hopes to attain 100% recognition levels for higher education credit mobility across Europe by 2020.<sup>2</sup> The Erasmus+ Annual Report 2015 cites an 85% recognition rate (pg. 21). There is a slight drop in recognition rates the following year, with the Erasmus+ Annual Report 2016 citing an 83% recognition rate (pg. 20).

Danish Agency for Science and  
Higher Education

Full academic recognition for all higher education students remains an ambitious target. For the countries participating in this analysis, data collected show the following levels of recognition:

*Table 1. Levels of full recognition for student mobilities for studies between program countries / call years 2014, 2015 and 2016<sup>3</sup>*

<b>Country</b>	<b>2014</b>	<b>2015</b>	<b>2016 (not finalized)</b>
Denmark	86.2%	87.4%	88.5%
Estonia	69.9%	75.1%	79.1%
Latvia	82.3%	82.6%	82.6%
Poland	76.3%	77.4%	78.5%
Sweden	83.2%	85.3%	85.3%

Non-attainment of full academic recognition presents a problem at the individual, institutional, and the policy level. The individual student, for example, may be delayed in the completion of their studies to great personal cost, while the HEI’s performance during the contractual period is evaluated by the National Agency based on a set of criteria including student recognition. Poorly performing HEI’s scoring under 50 points (of 100) in the final report evaluation rubric “qualitative objectives” might see their grants reduced at the time of final reporting.

On a policy level, countries such as Denmark have recently implemented reforms to encourage students to complete their degrees within normalized periods of time. Students’ non-attainment of full recognition for their Erasmus+ mobility periods is therefore in direct conflict with this policy impetus.

## **5. Contracting authority**

The contracting authority is:

<sup>2</sup> [https://ec.europa.eu/programmes/erasmus-plus/news/boosting-student-mobility-through-better-recognition\\_pl](https://ec.europa.eu/programmes/erasmus-plus/news/boosting-student-mobility-through-better-recognition_pl)

<sup>3</sup> From Erasmus+ dashboard.

Danish Agency for Science and Higher Education  
Bredgade 40  
1260 Copenhagen K  
Website: [www.ufm.dk](http://www.ufm.dk)  
Contact person: Anne Marie Logue: [amlo@ufm.dk](mailto:amlo@ufm.dk)

## 6. Tender deadlines and other contractual requirements

The closing date and time for the receipt of submissions and all requested documentation is November 9<sup>th</sup> 2018, 12.00pm. Late submissions will not be accepted.

Tenders should be sent as one combined pdf document to the Agency's contact person, Anne Marie Logue ([amlo@ufm.dk](mailto:amlo@ufm.dk)).

Danish Agency for Science and  
Higher Education

Please direct all enquiries and questions during the tender period in writing to the agency's contact person.

In order to ensure that the Agency's answers to any questions are communicated to all interested parties, kindly notify the Agency's contact person no later than October 26<sup>th</sup> 2018 of your intention to bid, including an e-mail to which questions/answers can be sent. Questions will be answered in writing, and both questions and answers will be sent in anonymous form to all parties who have expressed interest in bidding.

The financial framework for the assignment is 100.000 € (including MOMS/VAT).

The Agency may choose to enter into negotiations after the deadline with tenderers who have submitted conditional bids. If the Agency chooses to initiate negotiations, all relevant tenderers will be invited individually. After a round of negotiations, each tender will be re-evaluated based on the negotiations.

The Agency will then decide which tenderer is awarded the contract. All tenderers will be informed in writing as soon as possible (and at the same time) about the result.

Any reservations for parts of the tender documents must be clearly stated. There can be no reservations for basic conditions or reservations that cannot be price-set.

Please note that there is no legally binding agreement or promise of such agreement before the contract has been signed. Contracts will follow the form of the agency's standard contract, enclosed as Annex 1.

## 7. Scope of the analysis

The analysis should map out potential barriers to full academic recognition and challenges in reporting levels of recognition for students participating in Erasmus+ KA1: Learning Mobility of Individuals in the field of higher education, more specifically student mobility for studies (KA103-SMS).

The analysis will cover the following countries: Denmark, Estonia, Latvia, Poland and Sweden. The analysis should cover the call years: 2014, 2015 and 2016.

The analysis should consist of five country-specific analyses, as well as a final, brief comparative analysis of the recognition landscape in the five countries.

The purpose of the analysis is to provide the aforementioned countries' NAs with solid background information on the matter for use in their national administration of the Erasmus+ Program and in their strategic communication to their HEIs.

The analysis should focus on individual, institutional and other barriers to reporting and achieving full academic recognition.

During the conducting of the analysis, the NAs can provide, as required, further information and data about Erasmus+ mobilities and recognition levels in their countries from sources of data available to the NAs (see section 3).

Danish Agency for Science and  
Higher Education

It is up to the tenderers to choose their preferred methodology, including the method of additional data collection (beyond data provided by the NAs), which they must describe and justify in the proposal why they have chosen. They must also describe how quantitative and qualitative data will be analysed. The contracting authority expects to be able to see and provide feedback on any questionnaires that are developed.

The report should at a minimum address the following questions:

*Individual barriers to full academic recognition*

- Please see Section 4: Academic Recognition of the participant report (call 2015 and call 2016) for a more exhaustive list of individual barriers to full recognition.

*Institutional barriers to full academic recognition*

- Please see Section 4: Academic Recognition of the participant report (call 2015 and call 2016) for a more exhaustive list of institutional barriers to full recognition.  
Additional potential institutional barriers:
- Processing time of requests for recognition: processing time for the transfer of credits varies greatly from HEI to HEI from country to country. The process is not necessarily completed when students fill out participant reports (30 – 45 days after the end of the mobility period), the Survey on Recognition (45 days after the end of the mobility period) or the HEIs own final reports (2 months after project period's end). Thus after the students fill out the surveys, the final transfer of credits ("process of recognition") might still be ongoing at individual HEIs – thus generating incomplete answers.
- Incomplete data: HEIs have not been equally methodical about filling in the box in Mobility Tool (MT) for students' realized ECTS while on E+ mobility, data that is transferred into their final reports to the National Agencies. For example, the Danish NA has asked HEIs to start reporting on this in 2016 on a voluntary basis, while reporting on this parameter in MT is mandatory from 2017.

*Other issues*

- Nomenclature: is “academic recognition” a term that is too far from what it implies – i.e. a transfer of credits – lending itself to misinterpretation by students?
- Definition: are there competing interpretations of what “full recognition” means?
  - Definition in Participant Report: receiving credit for all courses listed in a final version of the Learning Agreement
  - Individual definitions: please note that levels of student recognition are self-reported by students in Participant Reports. For example, students may consider full recognition to be receiving credit for all courses actually completed while abroad.
  - or*
  - National definitions of full semester course loads: In Denmark: 30 ECTS points corresponds to a full semester’s course load, while in Estonia generally 15 ECTS is required for study abroad, but not everywhere, as it depends on the individual HEI.
- Conflicting data sources:  
Where do the “authoritative” numbers on academic recognition come from?
  - From Participant Reports: Levels of student recognition are self-reported by students in Participant Reports. KA103 participants receive the final Participant Report on the last day of the mobility. They are required to complete the report within 30 calendar days upon receipt of the invitation to complete it. If the Participant Report is not submitted 15 days after the original requested date, a new email is automatically sent to the participant and the requested date is updated to the reminder’s send date.  
**NB.** Check for discrepancies between number of realized student mobilities and number of participant reports.
  - From the Survey on Recognition: levels of student recognition are self-reported by students in the Survey on Recognition. New for the call 2016, if students have not finalized the recognition process when sending in their participant report, they then receive a Survey on Recognition 45 days after the end of their mobility period.
  - HEIs Final Reports: HEIs also report on student recognition levels in final reports, and for example for 2015 projects in Denmark, HEI’s report higher recognition levels (93%) than what can be found in E+ Dashboard (87%)
- E+ Dashboard vs. E+ link: data in the E+ Dashboard does not always correspond to data in E+ link. Also the E+ Dashboard contains categories without an apparent data source: how are the categories of *full*, *partial* and *no recognition* (from participant reports) translated to the 5 categories of *very negative*, *negative*, *neutral*, *positive* and *very positive* (from E+ Dashboard)?

Danish Agency for Science and  
Higher Education

The contracting authority expects to be involved during the process in order to create a shared set of expectations for the analysis and in order to adjust, if necessary, methodology and structure of the analysis underway.

The proposed time-plan for the analysis must therefore include, at a minimum, a start-up meeting in 6<sup>th</sup> or 7<sup>th</sup> December 2018 and a midway evaluation meeting with the contracting authority. If the analysis includes user surveys or questionnaires, the schedule and plan of activity should include a consultation period of two weeks for the NAs to provide feedback on the proposed surveys.

The analysis must in English and be approximately 50 pages long excluding appendixes, including a one-page summary, as well as a PowerPoint presentation that summarizes the results of the analysis.

In addition, the tenderer must provide the contracting authority with a copy of the raw data.

Finally, the tenderer must be prepared to give two presentations of the results of their findings before the project group and before an invited audience. Both presentations are to be held in Denmark.

Danish Agency for Science and  
Higher Education

Information about the EU's Erasmus+ Program is available here:

[http://eacea.ec.europa.eu/erasmus-plus\\_en](http://eacea.ec.europa.eu/erasmus-plus_en)

## **Requirements for the tender format**

The tender should not exceed eight pages (exclusive of annexes).

To help comparison and fair evaluation of the incoming tenders, tenderers are encouraged to use the following structure:

### *Tender description*

- Contact information
  - Company name
  - Contact person
  - Address
  - Telephone number and e-mail address
- Proposal, especially:
  - Primary research questions that the analysis seeks to address
  - Description of the applied methodology, with explanation of why it was selected, as well as description of the method of data collection
  - Description of how possible qualitative and quantitative data will be analysed
  - Description of expectations for the Erasmus+ national agencies' involvement

### *Annexes*

- Schedule and activity plan
- Fee and payment plan
- One page CV for each team member who will be involved in the preparation of the analysis

## 8. Evaluation criteria

The primary criterion for the Agency's evaluation of incoming tenders is the economically most advantageous bid with the following sub-criteria:

- **Proposal**, including research questions and the description of the proposed methodology and explanation of why it was selected, as well as the proposed schedule and activity plan for the analysis (50-60 percent)
- Your company's special **competences and capacity** to perform the analysis (25-35 percent)
- **Price** (10-20 percent)

### **Proposal, method, data, and process**

Under this criterion, the tenderer will be evaluated on its description of how it will address questions raised in subsection 7. In the evaluation, special importance will be placed on the description of the chosen methodology and the explanation of why it was selected.

Danish Agency for Science and  
Higher Education

### **Your company's special competences to perform the analysis**

Under this criterion, the tenderer's allocation of special skills and capacity to take on the assignment will be assessed. In the evaluation, experience with in-depth analyses, EU policy, higher education, including knowledge of national stakeholders will be emphasized.

### **Price**

Under this criterion, the full cost for conducting the analysis will be evaluated compared to the activities that are included in the proposal.

## 9. Tentative timetable

- Deadline for submitting tender: 9 November 2018, 12:00 pm
- Signing of contract: Late November 2018
- Start-up meeting: 6 December 2018 or 7 December 2018
- Midway evaluation meeting: No later than 15 February 2019
- Submission of 1st draft report: 1 March 2019
- Submission of 2<sup>nd</sup> draft report: 1 April 2019
- Adjustments after feedback from contracting authority / submission of final report: 13 May 2019