



ECHE Monitoring Guide

for Erasmus+ National Agencies

February 2026

Erasmus+

The present ECHE Monitoring Guide has been prepared for the Erasmus+ National Agencies to support them in their ECHE monitoring responsibilities.

EUROPEAN COMMISSION

Directorate-General for Education, Youth, Sport and Culture
Directorate B – Youth, Education and Erasmus+
Unit B.1 – Higher Education

E-mail: EAC-HE@ec.europa.eu

*European Commission
B-1049 Brussels*

PDF	ISBN 978-92-76-61985-7	doi: 10.2766/62164	NC-07-23-020-EN-N
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ECHE Monitoring Guide *for Erasmus+ National Agencies*

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Introduction

The role of the ECHE

The Erasmus Charter for Higher Education (ECHE) provides the general quality framework for European and international cooperation activities a higher education institution may carry out within Erasmus+. The award of an ECHE accreditation is a pre-requisite for all higher education institutions located in an EU Member State or third countries associated to the Erasmus+ programme and willing to participate in learning mobility of individuals and/or cooperation among organisations and institutions under Erasmus+.

In addition, the Erasmus Charter for Higher Education (ECHE) is vital for encouraging excellence in European universities' internationalisation policies and the concrete execution of their mobility activities. As a tool, the ECHE has particular power, in that higher education institutions (HEIs) in EU Member States or third countries associated to the programme wishing to participate in Erasmus+ must first apply for it and then obtain it. In addition, HEIs in third countries not associated to the programme wishing to participate in Erasmus+ individual mobility must also guarantee that they will apply the principles it contains.

The ECHE application and award process explicitly aims at greater involvement of each HEI and its staff in fostering an institutional culture of strategic thinking, transparency, fairness and effectiveness in internationalisation, rather than promoting simplistic adherence to formal rules. ECHE holders not only promise to abide by those rules: they must also describe their own internationalisation strategy and formulate it convincingly as their "Erasmus Policy Statement" (EPS), publish it and stand by it. They must also stand ready to justify how they comply with the ECHE principles.

Aims and limits of this guide

In harmony with the aim of the ECHE to involve various actors in each HEI in a proactive effort to enhance the quality of their internationalisation and modernisation strategies including mobility, the ECHE self-assessment tool is available to HEIs and offers a good opportunity to involve key figures (e.g. rectors, Erasmus+ coordinators, international office staff (IROs)) in active reflection on how to improve their international dimension by self-evaluating their current practices against the ECHE principles. An updated version of the tool based on the new ECHE for the 2021-2027 Erasmus+ programme will be made available online in 2023.

However, the task of promoting and monitoring the compliance of ECHE holders with the ECHE is entrusted to the Erasmus+ National Agencies (NAs) of the EU Member States and third countries associated to the programme. To ensure a level of harmonisation in the way National Agencies undertake the monitoring, the aim of the present guide is to provide a set of agreed guidelines and examples of good practices for the use of National Agencies in the process of monitoring and supporting the ECHE holders.

In the case of international mobility (both KA131 and KA171), HEIs located in third countries not associated to the programme are not eligible to receive an ECHE¹. However, in order to take part in Erasmus+ mobility between EU Member States or third countries associated to the programme, and third countries not associated to the programme, they must sign an inter-institutional agreement with their ECHE-holding partner, which integrates the ECHE principles. The ECHE holder is responsible for reporting on the mobilities and recognition, and the National Agencies will monitor how international mobility is managed, and whether the beneficiaries are able to ensure that ECHE principles are observed.

Although monitoring will differ in certain aspects, this guide can also be used to provide guidance for National Erasmus+ Offices, Erasmus+ National Focal Points, and EU Delegations located in third countries not associated to the programme.

The European Commission has prepared this manual along with a working group formed of experts from the Erasmus+ National Agencies, higher education institutions and student representatives. The objective has been to provide guidelines that are reasonable, clear, fair, practical and helpful in promoting excellence in organising Erasmus+ mobility and cooperation projects. This guide should be read in complement with the recommendations of the [ECTS Users' Guide 2015](#) and the [ECHE guidelines](#).

The ECHE working group understands that monitoring and ensuring compliance will rarely be a case of black and white. It is foreseen that the HEIs will progressively be encouraged by NAs to improve where deficiencies are found, and that only those that repeatedly do not show commitment towards improving, will eventually be excluded from the ECHE, and hence from Erasmus+.

Under these circumstances, the monitoring processes should be limited to issues directly connected to the application of ECHE principles and to the compliance of ECHE holders with those principles. In some countries the Erasmus+ National Agency may have a broader mandate for enhancing their higher education systems in general, but this guide focuses on specific ECHE related checks and suggestions for enhancing compliance in a positive direction.

To make sure the monitoring is objective and based on clearly established parameters, the National Agencies have at their disposal a series of evaluation grids that are annexed to this guide.

¹ With the exception of the Western-Balkan countries that are not associated to the Erasmus+ programme that can apply for the ECHE in order to participate as full partners in the European University Alliances.

Chapter 1 – The ECHE principles

All HEIs that have been awarded an ECHE have committed to adhering to the principles quoted below².

In general, the institution undertakes to:

- Respect in full the principles of non-discrimination, transparency and inclusion set out in the Erasmus+ Programme.
- Ensure equal and equitable access and opportunities to current and prospective participants from all backgrounds, paying particular attention to the inclusion of those with fewer opportunities.
- Ensure full automatic recognition of all credits (based on the European Credit Transfer and Accumulation System – ECTS) gained for learning outcomes satisfactorily achieved during a period of study/training abroad, including during blended mobility.
- Charge no fees, in the case of credit mobility, to incoming mobile students for tuition, registration, examinations or access to laboratory and library facilities.
- Ensure the quality of the mobility activities and of the cooperation projects throughout the application and implementation phases.
- Implement the priorities of the Erasmus+ Programme:
 - By undertaking the necessary steps to implement digital mobility management in line with the technical standards of the European Student Card Initiative.
 - By promoting environmentally friendly practices in all activities related to the Programme.
 - By encouraging the participation of individuals with fewer opportunities in the Programme.
 - By promoting civic engagement and encouraging students and staff to get involved as active citizens before, during and after their participation in a mobility activity or cooperation project.

² Information on the ECHE can be found on the Erasmus+ [website](#) and a sample certificate can be found [here](#).

When participating in mobility activities the institution undertakes to do the following:

Before mobility:

- Ensure that selection procedures for mobility activities are fair, transparent, coherent and documented.
- Publish and regularly update the course catalogue on the website well in advance of the mobility periods, so as to be transparent to all parties and allow mobile students to make well-informed choices about the courses they will follow.
- Publish and regularly update information on the grading system used and grade distribution tables for all study programmes. Ensure that students receive clear and transparent information on recognition and grade conversion procedures.
- Carry out mobility for the purpose of studying and teaching only within the framework of prior agreements between institutions which establish the respective roles and responsibilities of the parties, as well as their commitment to shared quality criteria in the selection, preparation, reception, support and integration of mobile participants.
- Ensure that outgoing mobile participants are well prepared for their activities abroad, including blended mobility, by undertaking activities to achieve the necessary level of linguistic proficiency and develop their intercultural competences.
- Ensure that student and staff mobility is based on a learning agreement for students and a mobility agreement for staff, validated in advance between the sending and receiving institutions or enterprises and the mobile participants.
- Provide active support to incoming mobile participants throughout the process of finding accommodation.
- Provide assistance related to obtaining visas, when required, for incoming and outgoing mobile participants.
- Provide assistance related to obtaining insurance, when required, for incoming and outgoing mobile participants.
- Ensure that students are aware of their rights and obligations as defined in the Erasmus Student Charter

During mobility:

- Ensure equal academic treatment and the quality of services for incoming students.
- Promote measures that ensure the safety of outgoing and incoming mobile participants.
- Integrate incoming mobile participants into the wider student community and in the

- Institution's everyday life. Encourage them to act as ambassadors of the Erasmus+ Programme and share their mobility experience.
- Provide appropriate mentoring and support arrangements for mobile participants, including for those pursuing blended mobility.
- Provide appropriate language support to incoming mobile participants.

After mobility:

- Provide incoming mobile students and their sending institutions with transcripts of records containing a full, accurate and timely record of their achievements at the end of the mobility period.
- Ensure that all ECTS credits gained for learning outcomes satisfactorily achieved during a period of study/training abroad, including during blended mobility, are fully and automatically recognised as agreed in the learning agreement and confirmed by the transcript of records/traineeship certificate; transfer those credits without delay into the student's records, count them towards the student's degree without any additional work or assessment of the student and make them traceable in the student's transcript of records and the Diploma Supplement.
- Ensure the inclusion of satisfactorily completed study and/or traineeship mobility activities in the final record of student achievements (the Diploma Supplement).
- Encourage and support mobile participants upon return to act as ambassadors of the Erasmus+ Programme, promote the benefits of mobility and actively engage in building alumni communities.
- Ensure that staff is given recognition for their teaching and training activities undertaken during the mobility period, based on a mobility agreement and in line with the institutional strategy.

When participating in European and international cooperation projects the institution undertakes to:

- Ensure that cooperation activities contribute towards the fulfilment of the institutional strategy.
- Promote the opportunities offered by the cooperation projects and provide relevant support to staff and students interested in participating in these activities throughout the application and implementation phase.
- Ensure that cooperation activities lead to sustainable outcomes and that their impact benefits all partners.
- Encourage peer-learning activities and exploit the results of the projects in a way that will maximise their impact on individuals, other participating institutions and the wider academic community.

For the purposes of implementation and monitoring, the institution undertakes to:

- Ensure that the long-term institutional strategy and its relevance to the objectives and priorities of the Erasmus+ Programme are described in the Erasmus Policy Statement.
- Ensure that the principles of the Charter are well communicated and are applied by staff at all levels of the Institution.
- Make use of the ECHE Guidelines and of the ECHE Self-assessment to ensure the full implementation of the principles of this Charter.
- Regularly promote activities supported by the Erasmus+ Programme, along with their results.
- Display the Charter and the related Erasmus Policy Statement prominently on the Institution's website and on all other relevant channels.

The Institution acknowledges that the implementation of the Charter will be monitored by the Erasmus+ National Agency and that the violation of any of the above principles and commitments may lead to its withdrawal by the European Commission.

Chapter 2 – Good Practices

National Agencies need to make sure that the ECHE is correctly implemented by HEIs in their countries by, on the one hand, providing continuous guidance and support to these institutions and on the other, by monitoring HEIs for compliance.

Below are examples of practices in guiding and monitoring HEIs that are currently in use across the Erasmus+ NAs. The European Commission and the ECHE working group recommend NAs implement these practices in order to make sure that ECHE holders are well equipped to meet the ECHE commitments.

Good practices in NA guidance to HEIs

1. Information sessions for newcomers

NAs can organise information meetings to help HEIs prepare their ECHE applications. During these meetings, NAs can present the ECHE principles and what they mean in terms of commitments for ECHE holders.

Further information meetings for newcomers are can also be organised when the ECHE has been obtained, to help newcomers get started in the Erasmus+ programme.

2. Information sessions for all ECHE holders

NAs can invite all ECHE holders to information sessions to present and discuss in detail the priorities of the Erasmus+ programme and the pressure points of ECHE monitoring (explained in Chapter 4).

NAs can choose to present to their HEIs the main findings of their ECHE monitoring several times during the programming period. This is a good opportunity to remind ECHE holders of their commitments, especially when there has been staff turnover in the HEIs.

3. Themed meetings for HEI staff

NAs can engage in thematic monitoring, and organise meetings with Erasmus+ coordinators on specific themes. Such meetings can provide a good platform for sharing good practices on the chosen ECHE priorities (for example, transparency, student support, digitalisation, etc.).

In cases where some ECHE principles are considered problematic in a specific country, it is advised to organise thematic meetings on the topic, for example in the form of focus groups, to discuss the topic and ways to remedy the issue.

NAs can also organise meetings for both staff working in international relations directly and other staff in HEIs whose duties are relevant to the ECHE priorities, such as professors in charge of course development, IT staff or inclusion officers. Staff can be informed, for example, about the use of the European Higher Education Area (EHEA) transparency tools, the European Student Card Initiative, full automatic recognition, and other topics to help them understand how they can better comply with the ECHE priorities. Outside experts and speakers can be involved in such meetings, for example “Bologna experts”, student associations, municipalities, etc.

4. Guidance on an individual basis and benchmarking

The NA is expected to provide guidance on an individual basis to HEIs in various ways. After each project final report evaluation NAs for example provide the beneficiary with a detailed analysis of their report, individual feedback and further recommendations on what needs to be improved. After each site visit, NAs also give individual feedback and provide recommendations for the institution in question.

If needed, NAs could consider offering the possibility of supporting visits by experts to HEIs that request it, in case institutions feel that they do not fully grasp some of the topics the ECHE addresses and therefore cannot meet the ECHE principles.

NAs can also extract data from final participant reports from all HEIs in their country and provide the beneficiaries with a summary of how all HEIs are performing. This allows individual HEIs to see where they stand in comparison with other HEIs in the same country.

NAs should also provide support and guidance to ECHE holders continuously via phone calls, emails, Facebook/Teams groups for HEIs coordinators, newsletters and other means. Larger NAs could also consider having thematic groups or channels on their online platform of choice where HEIs can exchange best practices and discuss issues.

The NAs can also consider using the [ECHE self-assessment tool](#) for individual guidance. Even if the self-assessment tool is mainly conceived for the use of HEIs it might still be a useful tool for NAs. NAs can suggest to HEIs to communicate the

results of their self-assessment to them, for example to help identify where more guidance or monitoring is needed. Having multiple HEIs send in their results could also help identify national trends that the NA can address. Nonetheless, sharing the results of the self-assessment should not be mandatory for HEIs.

Good practices for monitoring HEIs

National Agencies take different approaches to monitoring ECHE compliance by the HEIs. Choosing which monitoring approach to use and which HEIs to monitor will depend on the national context and the number of HEIs in the country. The scope of ECHE monitoring can be rather extensive, covering all the ECHE holders of a country, or more focused, based on a sample of HEIs selected each year.

There are various ways NAs approach this selection, for example,

- choosing institutions based on the final scores of the project final reports, or
- prioritising newcomers to the programme, or
- focusing on institutions with a high number of complaints, or
- random selection, etc.

The frequency of monitoring will depend on the approach taken by the NA and the size of the higher education sector, but it is essential to:

- monitor each ECHE holder at least once during the programming period, preferably more times
- put in place a follow-up mechanism to make sure institutions have taken action following the recommendations from one monitoring cycle

The commitments of the ECHE also cover a wide range of responsibilities and some are simpler to monitor than others.

Below is a list of methods that can be used by NAs to undertake monitoring, divided by scope (comprehensive and sample vs. individual monitoring) and organised by type of monitoring or the source of data.

1. Comprehensive or sample monitoring of ECHE holders

Assessment and follow up of ECHE applications and expert comments

The starting point for the monitoring by National Agencies is the ECHE application of the HEI and their Erasmus Policy Statement, along with the comments from the ECHE application evaluators. In the Erasmus Policy Statement (EPS), applicants describe how they plan to participate in Erasmus+ actions and how the actions will be implemented in their institutions. It furthermore includes strategy, objectives and the impact of the participation in the Erasmus+ programme. If the organisation updates the EPS during the Erasmus+ programme lifecycle, it should place the new EPS on its website and inform its National Agency.

In addition, HEIs have had to make explicit reference to how they are complying with the ECHE principles in other parts of the ECHE application. During the evaluation of the ECHE applications, experts also sometimes issue guidance or a conditional approval. Therefore, the experts' comments and advice should be a starting point for NA monitoring.

Some HEIs might need a lot of support to be able to adhere to all of the ECHE commitments. This can for example be the case for smaller institutions or VET

institutions with limited ECTS experience, or institutions that mainly focus on traineeships. NAs should take note of these institutions and the experts' comments in the ECHE application and provide appropriate and proportionate support to these institutions to help them reach their goals. This can for example mean guidance on developing the course catalogues, transitioning from only traineeships to staff mobility or student mobility for studies, or support with first KA2 applications etc.

The ECHE applications of HEIs and the experts' comments are available to the NAs in the Project Management Module (PMM) in the organisation profile.

Conducting regular surveys

NAs can issue yearly surveys to the HEIs asking for a self-assessment of adherence to the ECHE principles. The survey can serve not only for data collection but also as a regular reminder of the ECHE commitments and an opportunity for HEIs to critically assess their progress. The survey can be addressed to various members of the HEI community, if relevant. Good practice, like with any surveys, is to keep the survey relatively short, use it only to gather information that is otherwise not available to the National Agency and issue it at a time when the HEI is able to dedicate time to it avoiding the peak business times during the academic year.

Use of data from participant or beneficiary reports across years

NAs have not only the data from latest participant and beneficiary reports at their disposal, but also reports from previous years and should therefore be able to assess the trends in implementation of the ECHE principles over the years. Comparison of the statistical data provided in the participant reports over the years can reveal some positive or negative trends in individual HEIs or even in the whole country. The same goes for final beneficiary reports.

Extraction of data from the Erasmus Without Paper Statistical Portal

NAs can obtain reports on the state of play of digitalisation of inter-institutional agreements and learning agreements by individual institutions in their country by downloading data from the [EWP Statistical Portal](#). This data will be regularly updated by the EWP Network users themselves and progressively supplemented with new indicators.

2. Individual monitoring of ECHE holders

Desk monitoring

The regular contact between NAs and HEIs is called desk monitoring and includes responding to queries by email and phone. In addition, NAs are often reference points for individual complaints from participants, many of which may alert them to problems in ECHE compliance. For example, these might be complaints about misleading or inadequate information in the course catalogue, complaints about lack of inclusion, complaints about recognition, student rights or digitalisation. In such cases, the NA will follow up the complaint, asking for the viewpoint of the sending and receiving institutions and other parties involved, while ensuring the confidentiality of the details of the complainant when necessary, to verify whether the complaint is justified and follow-up in an appropriate and timely manner. It is recommended to establish a registry of complaints, where NAs can provide information about the complaint, all the details and actions taken and record the follow-up. In cases of repeated instances of

similar complaints, the NA could for example organise a thematic meeting with the HEIs to discuss the topic and provide examples of good practices.

Site visits used to meet Erasmus+ coordinators or based on needs

NAs sometimes visit HEIs to attend conferences, meetings, or to discuss project implementation. On these occasions, the National Agency could meet the Erasmus+ coordinators and discuss with them the implementation of the ECHE principles. Site visits are not mandatory, but may be decided on during or after mobility actions.

ECHE monitoring visits

The NA may organise monitoring visits (physical or online) to the HEIs. For example, this can be done if the HEI requests it, for newcomers in the actions, in parallel with system checks, for HEIs that have not participated in coordinators' meetings or other events, or when serious concerns have been expressed by Erasmus+ mobility participants.

In each of these cases, the visit might also be used to monitor the pressure points in more detail. It can also be an occasion for discussing and clarifying what ECHE compliance implies.

During visits the NA is encouraged to interview not only staff members in the institution but also students who have been mobile or are planning their mobility as well as incoming students. The NAs can also consider consulting student representatives working on the internationalisation and mobility policies of the institution.

Chapter 3 – Procedures in case of non-compliance

Higher education institutions must comply with the ECHE commitments based on what they have described in their applications to obtain the ECHE. Parts of the applications may prove aspirational and contain future goals and in certain cases the application evaluators have recommended that NAs pay particular attention to weaker parts of the application. HEIs should feel responsibility for what they have declared and promised in their applications, and make the changes necessary so that they are consistently compliant with the commitments of the ECHE, whether or not they already were when they applied.

Steps to be taken when non-compliance is identified

1. Whether for simple matters or for more complex monitoring, the first step will be for the NA to advise the HEI, unofficially, that it has identified a problem, asking the HEI to present its point of view. Ideally, the HEI should either give convincing explanations, or correct the defect identified, and the NA can take note. Otherwise, the NA should advise the HEI officially that there appears to be a lack of compliance, and invite the HEI formally to present its point of view.
2. In subsequent correspondence or contacts, a plan for compliance should be agreed upon, which lays out deadlines and steps to be taken. NAs should ask the HEI to produce a remedial action plan, which should comprise at least the following aspects:
 - concrete measures to remedy the situation

- person responsible for the changes
 - time frame (deadlines)
3. If the deadlines are not met, the HEI must be warned again. If there is insufficient evidence of ability or desire to comply, the matter must be referred to the European Commission.
 4. The European Commission will investigate the degree of non-compliance and will invite the institution to create a valid action plan for remedying the situation. If this is not implemented, the Charter may be withdrawn.

The HEI may also be penalised for non-compliance by the National Agency by reducing the organisational support (OS) if the final report is judged overall unsatisfactory. This may be done before the matter has been referred to the European Commission.

The Erasmus Charter for Higher Education may be suspended or withdrawn where it is established that the Charter was awarded on the basis of incorrect, incomplete or conflicting eligibility confirmation, or where the higher education institution does not comply with the administrative and procedural requirements governing eligibility under the ECHE framework.

No party wants to reach the point of withdrawing the Charter but for the credibility of the ECHE and the Erasmus+ programme, it will be necessary to do so wherever severe defects are identified and are not remedied.

Qualifying factors in the assessment of non-compliance

When it comes to the implementation of some of the new features of the ECHE and the new priorities of the Erasmus+ programme as a whole, the NAs are encouraged to focus on offering guidance and support to all beneficiaries. It is to be expected that not all HEIs are fully compliant with all the principles of the ECHE at the start of the monitoring period, especially when it comes to new features, such as inclusion and digitalisation. In cases of non-compliance, HEIs must nevertheless provide a clear and convincing explanation of why they are not compliant with a particular ECHE principle and what they will do to remedy the situation. HEIs need to be able to explain their commitment to the ECHE principle in question and then it is then up to the NA to evaluate whether or not the non-compliance can be rectified and what steps are needed.

The NAs are encouraged to take into account the size and type of institution during the monitoring, the previous experiences of the HEI in the programme, and whether they rely on other external stakeholders to meet certain ECHE requirements, for example the collaboration of partners or third party software providers when it comes to digitalisation.

Chapter 4 – Pressure points

In order to obtain the Charter each HEI had to explain how it is complying with the principles set out in the Charter and therefore each Charter holding institution is obliged to respect all the principles set out in the Charter. In theory, the NAs should then monitor the compliance of institutions to all the principles of the Charter.

However, in order to organise a meaningful monitoring process, the most critical priorities have been identified and should be the focus of the monitoring done by the NAs in the programming period 2021-2027.

As can be observed from the principles listed above, many – not all – regard mobility. While the ECHE includes other important aspects as well, the central objective of the ECHE is to guarantee, improve and enhance the quality of individual mobility. Therefore, efforts should primarily be dedicated to monitoring and guidance in key areas that affect the functioning of Erasmus+ mobility.

For this purpose, three "Pressure Points" have been identified based on their importance for the smooth functioning of the programme and their link to the overall Erasmus+ programme priorities. They are the following:

1. Core mobility principles

- a. Course catalogue
- b. Recognition
- c. Grading systems, credit transfer and grade conversion
- d. Student support

2. Inclusion

3. Digitalisation

This chapter will explain in more detail each pressure point and how the evaluation grid annexed to this document can be used by NAs to monitor HEIs on these three pressure points.

The Core mobility principles pressure point builds on the experiences of the previous programme generation and the previous monitoring guide. The former 2016 ECHE monitoring guide for National Agencies also set out three pressure points: Course Catalogues, Recognition and Information on grading systems, credit transfer and grade conversion (including grade distribution tables). When starting the work on the new monitoring guide, the ECHE working group agreed that these previously defined pressure points still remain essential to the monitoring of the ECHE and should remain a point of focus. As these points are not new to institutions and NAs, and many institutions have already made considerable progress on these points, the group decided to combine the three to form a new pressure point. The Core mobility principles pressure point also includes an aspect of student support, which the ECHE working group considered required additional attention following the publication of the Erasmus+ Student Charter.

Some of the pressure points from the previous programme are expected to be implemented by most HEIs already, while others, such as those focusing on novelties in the Erasmus+ programme, can be seen as more of a "work in progress". There the role of the NA is not only to monitor but to also to use the pressure points to provide guidance and support to the HEIs where needed so they can improve their implementation.

1. Core Mobility Principles

The Core mobility principles pressure point is essential to the student mobility journey and in order for students and staff to participate in successful mobilities, the HEI must provide some core support and preparation.

The first three aspects of this pressure point are a continuation of the Charter from the previous Erasmus+ programme generation and the majority of participating institutions should be thoroughly familiar with them. However, data from final participant reports and experiences of the NAs themselves show that there is still work to be done by the HEIs when it comes to this topic and that it is important to keep them as a part of the pressure points.

The fourth aspect is student support. Student support is an integral part of the ECHE and in many ways its main focus, as institutions commit in the ECHE to ensure equal academic treatment and quality of services for incoming students. They also commit to integrate students into their community, and provide appropriate mentoring and support arrangements. NAs have various ways of monitoring how institutions provide student support but one of the most important tools are the participant reports and the feedback from both incoming and outgoing mobile participants.

Evaluation grid

The accompanying evaluation grid mentions the following monitoring points:

1. Course catalogue

- 1.1 Timely publication (=availability before the signature of the learning agreement), completeness and regular update of the course catalogue for the next semester/academic year
- 1.2 Accessibility of the course catalogue, on the website, available in a widely spoken language

As mentioned in the ECHE, institutions must publish and regularly update the course catalogue on their website well in advance of the mobility periods. In order for mobile students to make well-informed choices about the courses they will follow, the catalogue should be published in a timely manner, be easily available on the website of the institution and available in a widely spoken language.

NAs can monitor these aspects through the participant reports and by examining the websites of the individual HEIs.

2. Recognition

- 2.1 Learning agreement fully completed and signed by all parties in advance of mobility with all the activities clearly described for the outgoing students
- 2.2 Timely dispatch of the transcript of records (sent within 5 weeks to partner institutions) for the incoming students
- 2.3 Full automatic recognition of study mobility (using ECTS or compatible system) in a reasonable time, virtual part included
- 2.4 Recognition of student mobility for traineeships (except recent graduate traineeships), virtual part included
- 2.5 HEI use of the Diploma Supplement³
- 2.6 Recognition of staff mobility, virtual part included

Recognition remains one of the most important aspects of student mobility but is also important to the mobility of staff members in HEIs. In order to facilitate the smooth recognition of the mobility period, the learning agreement must be fully completed

³ Diploma Supplement: a document attached to a higher education diploma issued by the competent authorities or bodies, in order to make it easier for third persons – particularly in another country – to understand the learning outcomes acquired by the holder of the qualification, as well as the nature, level, context, content and status of the education and training completed and skills acquired. See the Council Recommendation on promoting automatic mutual recognition. More details [here](#).

before the mobility, the transcripts dispatched in a timely manner for incoming students and the mobility automatically recognised according to the learning agreement in a reasonable time. The virtual component of any blended mobility must be considered as an integral part of the mobility itself and therefore must be fully recognised just like the physical component. This means that all credits gained during the mobility, as agreed in the Learning Agreement and confirmed by the Transcript of Records, should be transferred without delay and counted towards the students' degree without any additional work or assessment of the student⁴.

The evaluation criterion for point 2.3 in the evaluation grid highlights the importance of automatic recognition as institutions which score below 100% on this point are automatically considered weak on this point.

HEIs must ensure the inclusion of satisfactorily completed study and/or traineeship mobility activities in the final record of student achievements and each graduate in their respective country should receive the Diploma Supplement automatically, free of charge and in at least one of the major European languages in addition to the national language. Preferably, the Diploma Supplement should be issued digitally, using the Europass Platform⁵. The HEI's policy on issuing the Diploma Supplement should be published on its website. Further details on the Diploma Supplement are listed in the ECHE guidelines and the Council Recommendation on promoting automatic mutual recognition.

NAs can monitor these aspects through the participant reports and by examining the websites of the individual HEIs. When monitoring the use of the Diploma Supplement NAs should focus on the records of previously mobile students, and can examine the websites of individual HEIs and discuss and monitor this topic through visits and checks.

3. Grading systems, credit transfer and grade conversion

- 3.1 Availability of full and accurate information on the grading system and grade distribution used in institutions/faculties (if applicable)
- 3.2 Full and accurate information on procedures of credit transfer and grade conversion provided to the student

Students must receive clear and transparent information on recognition and grade conversion procedures in order for their mobilities to be successful and to reduce any stress or uncertainty that could deter students from applying and going on mobility. This applies to both incoming and outgoing students.

NAs can monitor these aspects through the participant reports and by examining the websites of the individual HEIs.

4. Student support

- 4.1 Timeliness of grant payment to students
- 4.2 Availability of a mechanism to report complaints and issues during mobility for all mobile participants
- 4.3 Accessibility and timely provision of assistance for visa and insurance

⁴ HEIs must complete the full automatic recognition of study mobility according to the Council Recommendation of 26 November 2018 on promoting automatic mutual recognition of higher education and upper secondary education and training qualifications and the outcomes of learning periods abroad, see [here](#).

⁵ <https://europa.eu/europass/en>

- 4.4 Accessibility and provision of assistance in search of accommodation
- 4.5 Provision of and information on student support and services

The Erasmus+ grant is an essential part of the mobility experience and can also be seen as a matter of inclusion as many would not be able to participate in mobility activities without receiving an Erasmus+ grant. It is therefore important that the grant is paid to students in a timely manner, according to the dates and provisions stipulated in the participant grant agreement, and whenever possible before the mobility period starts. **Institutions should pay special attention to students with fewer opportunities and make sure those students receive the first grant payment before the start of the mobility in all cases.** There is a small financial risk present for the HEIs when issuing payments before a student submits a certificate of arrival, but the benefit of providing students with fewer opportunities with an advance payment that enables them to cover advance costs outweighs this risk.

NAs can monitor this point through the replies to the final participant reports, by looking at the grant agreements of participants and the payment dates. NAs should also pay attention to any complaints from students on this topic and provide the institutions involved with guidance and support to make sure that they are able to pay students on time.

Transparency and equal opportunities are fundamental parts of the ECHE and it is therefore important that students have the opportunity to report complaints and issues they might face before, during or after their mobilities. This applies to both outgoing and incoming students. NAs should check the availability of such a mechanism and how this is communicated to incoming and outgoing students. It is also possible to look at the satisfaction rates in final participant reports when it comes to support at sending and receiving institutions.

According to the Erasmus+ Student Charter, students are entitled to academic freedom in communicating or sharing ideas and facts, as well as in any potential research they might carry out throughout their mobility period. The mechanism to report complaints and issues mentioned above should also be used by students to report complaints where students feel they do not have academic freedom or that their rights have not been respected. NAs should check that students are made aware of this possibility for instance, by checking information packages sent to incoming students.

HEIs must also provide mobile participants with assistance when searching for accommodation and, when needed, for visa and insurance. HEIs should explain clearly to incoming mobile participants what accommodation options are open to them and what the conditions for renting accommodation are (i.e. costs, registration and accommodation contract details, responsibilities), so as to minimise any problems upon their arrival. Information should be available on the HEI's website. If students experience fraud or discrimination, the HEI should offer guidance and support to overcome the issue.

NAs can monitor the level of satisfaction of these different support mechanisms through the participant reports and on-site interviews.

In order to provide adequate support to students throughout their mobility journey, institutions need to provide mobile students with information on student support and services offered to them. This includes academic support, administrative support, mental health support and support with any inclusion needs. NAs can monitor the level

of satisfaction of these different support mechanisms through the participant reports and check the intuitional websites or information packages sent to selected students. Institutions also commit in the ECHE to promoting measures that ensure the safety of mobile participants and this should be checked as part of point 4.5.

2. Inclusion

Inclusion is one of the four horizontal priorities of the new Erasmus+ programme and a fundamental part of the new Erasmus Charter for Higher Education. In the Charter, institutions commit to ensure equal and equitable access and opportunities to current and prospective participants from all backgrounds, paying particular attention to the inclusion of those with fewer opportunities. Institutions furthermore commit to implement the priorities of the programme, including encouraging the participation of individuals with fewer opportunities in the Erasmus+ programme.

While inclusion is not a new concept and participation of students from disadvantaged backgrounds or students with special needs has been an important aspect of the Erasmus+ programme in the past, this topic and emphasis on inclusive mobility is still new for many institutions. It is therefore important for NAs to keep in mind that institutions might not have fully formed inclusion strategies ready at the start of the new programme. Therefore, NAs are encouraged to provide guidance and support to institutions when it comes to the creation of inclusions strategies for mobility and the inclusion of participants with fewer opportunities in mobility.

NAs play a significant role in the inclusion of participants with fewer opportunities in the Erasmus+ programme. For example, when it comes to the definition of the criteria for the top-up for participants with fewer opportunities, along with the national authorities, and also when it comes to the promotion of the Erasmus+ programme and opportunities available to all students.

NAs are reminded that the focus of the promotion of inclusive mobility should not only be on the student groups identified as eligible for the top-up to individual support for students with fewer opportunities, but should also include all students who are facing a barrier to mobility. The Programme Guide includes a very broad list of potential barriers and institutions should be encouraged to review the list and see how they can make sure to include students that might face any of the barriers mentioned there.

In the process of monitoring the compliance of the inclusion commitments, the NAs should make use of the expertise of Inclusion Officers appointed in every NA.

Evaluation grid

The accompanying evaluation grid mentions the following monitoring points:

- | |
|--|
| <ul style="list-style-type: none"> a) Existence of measures and quantitative and qualitative targets to ensure inclusive mobility b) Awareness of the national criteria for the top-up to individual support for students/recent graduates with fewer opportunities c) Outreach actions towards participants with fewer opportunities to encourage them to take part in mobility or cooperation activities. d) Fair and transparent selection procedures for outgoing students for mobility or cooperation activities. e) Use of blended mobility as one of the tools to make mobility more inclusive f) Information provision for incoming students with fewer opportunities, in particular students with physical, mental or health related conditions |
|--|

A) Existence of measures and quantitative and qualitative targets to ensure inclusive mobility

Through the monitoring of point a), NAs should gain a general overview of how institutions approach and work towards inclusive mobility. The European Commission does not expect all institutions to have in place a fully-fledged system of inclusion of underrepresented groups at the start of the programme but rather to show steady progress towards more accessible and representative student and staff mobility. The NAs are therefore invited to focus more on support and guidance in the first years of the programme.

Nevertheless, inclusion and ensuring equal access to opportunities are a fundamental aspect of the ECHE and should be respected and implemented by higher education institutions. To comply with the commitments of the ECHE, it is expected that institutions devise an inclusion strategy with their own targets and ambitions when it comes to inclusive mobility. Institutions should be encouraged to set their own qualitative and quantitative targets based on their student body and the national criteria for the top-up for students with fewer opportunities. The strategy can also include goals and targets when it comes to staff mobility, new staff members, and staff training strategies. This inclusion strategy should be widely published and be displayed to students enquiring about mobility opportunities. NAs should be able to monitor the existence of such a strategy by examining the websites of the individual institutions and discussing this topic during visits or checks.

B) Awareness of the national criteria for the top-up to individual support for students with fewer opportunities

It is very important that HEIs are aware of the national criteria for the top-up to individual support for students with fewer opportunities, and that the criteria and supporting documents needed are communicated to prospective students. Only if the students are aware of it, can the top-up have the desired effect of breaking down barriers to entry and providing an incentive to underrepresented groups to participate in mobility.

NAs should be able to monitor this by checking the institutional website and by viewing promotional material or preparation material for selected outgoing students and potential outgoing students. Institutions should also be encouraged to share information on the top-up and criteria with different offices within the institution.

C) Outreach actions towards participants with fewer opportunities to encourage them to take part in mobility or cooperation activities

Along with promoting the top-up and inclusion support to potential Erasmus+ participants, institutions should also be encouraged to promote mobility opportunities to potential applicants by using more than one way of outreach, for example by working with inclusion officers within the institution, student unions, other unions of people with fewer opportunities, student counsellors etc. This can be monitored through checks and discussion with the individual institutions.

D) Fair and transparent selection procedures for outgoing students for mobility or cooperation activities

HEIs have to have in place fair and transparent selection procedures for outgoing students that are explained on their website and communicated to students. There should also be in place a clear procedure for complaints and requests for justifications of selection. The NAs can monitor this aspect by checking the participant reports and the website of the institution.

HEIs should be invited to adapt selection procedures to cater for different types of students and critically assess whether their selection procedures could be excluding any type of student or staff member, for example students with learning difficulties. Selection procedures could be adapted to be more inclusive and NAs are invited to discuss this with institutions and guide them if needed.

E) Use of blended mobility as one of the tools to make mobility more inclusive

One of the key new features for higher education in the 2021-2027 Erasmus+ programme is the introduction of short-term physical mobility through blended mobility where students can combine a short physical component with a virtual component, for example through blended intensive programmes. These opportunities can be used by students with fewer opportunities who might have reservations about going on long-term mobility, or who are not able to go, for example due to commitments at home or restrictions in their study programmes.

Institutions should nevertheless make sure that students with fewer opportunities are not only offered short-term blended mobility opportunities. Blended short-term mobility should be seen as one of the tools to make mobility a possibility for all students but long-term physical mobility should still be the norm and be offered to all types of students. Short-term physical mobility could for example be seen as a stepping-stone for long-term physical mobility, encouraging more transnational experiences later in a student's study career. NAs can monitor this by examining the individual websites of HEIs and discussing this topic during checks and visits.

F) Information provision for incoming students with fewer opportunities, in particular students with physical, mental or health-related conditions

Institutions must provide incoming students with adequate information on services offered to them. They should pay particular attention to students with physical, mental or health-related conditions and students with learning difficulties. This information should be available on the website for incoming students. Institutions can additionally be encouraged for instance to publish information about accessibility and support measures for incoming students on existing platforms and tools, such as <https://inclusivemobility.eu> and the website of the European Agency for Special Needs and Inclusive Education (<https://www.european-agency.org>) to make their information accessible to even more people.

3. Digitalisation

Digital education and the digital transformation are a horizontal priority for the Erasmus+ programme, in line with the strategic priorities of the EU's Digital Education Action Plan (2021-2027). This is reflected in the ECHE in the commitment of the higher education institutions to implement the priorities of the Erasmus+ Programme, by undertaking the necessary steps to implement digital mobility management in line with the technical standards of the European Student Card Initiative.

The European Student Card Initiative is furthermore one of the flagship initiatives of the European strategy for universities. This highlights the importance of this part of the ECHE and is the reason why the digitalisation of mobility management is one of the pressure points NAs need to monitor.

The European Student Card Initiative includes the development and continuous enhancement of the Erasmus+ Mobile App, which facilitates the Erasmus+ mobility of mobile learners. The app provides them with an easier entry point to information about mobility opportunities, digitalised administrative procedures and helps them connect to a digital community of mobile learners.

As these digitalisation processes are still in development, and full interoperability between different systems in the EWP Network is still being established (in line with the interoperability reinforcement plan put in place in 2022), NAs are encouraged to focus more on giving guidance and support on this topic in the first years of the new programme and help institutions improve their implementation of the new features. Including digitalisation as a pressure point to monitor was considered necessary due to the importance of the topic, and the accompanying evaluation grids should be seen as a starting point for monitoring the implementation of digital mobility management by HEIs.

In the process of monitoring the compliance of the digitalisation commitments, the NAs should make use of the expertise of Digital Officers appointed in every NA.

Evaluation grid

The accompanying evaluation grid mentions the following monitoring points:

- a) Digitalisation of bilateral intra-European inter-institutional agreements (IIAs)
- b) Digitalisation of learning agreements for intra-European study mobility for incoming and outgoing students
- c) Commitment to the digitalisation of the Erasmus+ programme

A prerequisite for the digitalisation of the Erasmus+ mobility management is that HEIs are connected to the Erasmus Without Paper Network, a point-to-point network open free of charge to all ECHE holders that enables secure data exchanges between partners via a set of application programming interfaces (APIs). At the start of the programming period 2021-2027, ECHE holders are expected to implement two sets of APIs – the exchange and signature of inter-institutional agreements, and the exchange and signature of learning agreements. The NAs are therefore to monitor the progress of HEIs in turning their paper-based agreements into digital agreements. In the future, NAs may be expected to monitor the digitalisation of other aspects of digital mobility management.

It is important to note that in the case of the digitalisation pressure point, HEIs are dependent to an extent on their partners in order to fully comply with the digitalisation commitments in the Charter. NAs should keep this in mind during monitoring, for example when an institution is fully connected to the EWP and ready to exchange data but their partner is not. NAs are therefore encouraged to focus on giving guidance and support on this pressure point. NAs are furthermore encouraged to continue their collaboration with other National Agencies and the sharing of good practices when it comes to the digitalisation of the Erasmus+ programme.

A) Digitalisation of bilateral intra-European inter-institutional agreements (IIAs)

After 31 December 2022, all ECHE holders are expected to switch from paper-based to digitally exchanged and signed IIAs between two partners in EU countries and third countries associated to the programme. For the time being and until eSignature becomes a function available in EWP, approval by both parties in the EWP network is considered as the equivalent of a digital signature confirming institutional commitment, provided the institutional legal representative has given an internal mandate. If necessary, due to local rules or regulations, a legal representative can sign Inter-institutional agreements on top of the EWP approval outside the network. In such exceptional cases, HEIs are encouraged to sign digitally and in full compliance with eIDAS legislation⁶. As of January 2023, NAs will be able to monitor the digitalisation of the bilateral IIAs by monitoring the number of IIAs that are signed digitally compared to the total number of Erasmus+ bilateral intra-European IIAs the individual HEI has signed. This functionality will be made available through the [EWP statistical portal](#).

B) Digitalisation of learning agreements (LAs) for study mobility for intra-European incoming and outgoing students

For all new LAs signed after the 31 December 2022, all ECHE holders are expected to switch from paper-based to digitally exchanged and signed LAs. The Erasmus+ App or the www.learning-agreement.eu portal, among other solutions, can support students to initiate or sign learning agreements with their sending and receiving institution.

As of January 2023, NAs will be able to monitor the digitalisation of learning agreements of outgoing and incoming students by monitoring the number of learning agreements that are signed digitally, compared to the total number of Erasmus+ learning agreements for student mobility for studies the individual HEI has signed. This functionality will be made available through the [EWP statistical portal](#).

C) Commitment to the digitalisation of the Erasmus+ programme

In addition to exchanging data via the Erasmus Without Paper network, institutions are expected to show further commitment to the digitalisation of the Erasmus+ programme by embracing other digitalisation tools that make collaboration across borders easier in today's increasingly digital world:

- Institutions are asked to adopt the **European Student Identifier**, a unique identifier that enables Erasmus+ mobile participants to be identified across the digital tools, shortening the time they spend on online identification.
- Institutions can furthermore start using and promoting the **Erasmus+ mobile application**. For example, the Erasmus mobile application can be promoted to students just starting their higher education as part of a welcome package. The app can also be promoted to potential outgoing students as one of the ways to find suitable host institutions, and to already selected outgoing participants as part of their preparation. The app can also be promoted to incoming students as a way to encourage them to find events and discounts in their host city. Erasmus+ students and alumni should be encouraged to submit tips and share their experience with other prospective Erasmus+ students.
- Institutions are encouraged to turn their student cards into **European student cards**, enabling their outgoing students to have easier access to on campus

⁶ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32014R0910>

and off campus services when abroad and contributing to a sense of joint European student identity.

NAs can monitor the commitment to these digitalisation tools through checks, visits and discussions with the HEIs and by examining their websites. Some statistical data will additionally be available and provided to NAs by the European Commission and its contractors on the take up of the European Student Card.

Useful links

Erasmus Charter for Higher Education 2021-2027 Guidelines

<https://erasmus-plus.ec.europa.eu/document/erasmus-charter-for-higher-education-2021-2027-guidelines>

Commission Communication on a European strategy for universities

<https://education.ec.europa.eu/document/commission-communication-on-a-european-strategy-for-universities>

Inter-institutional agreements:

<https://erasmus-plus.ec.europa.eu/resources-and-tools/inter-institutional-agreement>

Learning agreements:

<https://erasmus-plus.ec.europa.eu/resources-and-tools/mobility-and-learning-agreements/learning-agreements>

Mobility agreement:

<https://erasmus-plus.ec.europa.eu/resources-and-tools/mobility-and-learning-agreements/mobility-agreements>

Erasmus+ student charter:

<https://erasmus-plus.ec.europa.eu/resources-and-tools/erasmus-student-charter-0>

National Erasmus+ Offices:

<https://erasmus-plus.ec.europa.eu/contacts/national-erasmus-offices>

ECTS Users' Guide 2015:

<https://op.europa.eu/en/publication-detail/-/publication/da7467e6-8450-11e5-b8b7-01aa75ed71a1>

ECTS video on "ECTS grade distribution tables":

<https://audiovisual.ec.europa.eu/en/video/I-101940>

Erasmus Without Paper Competence Centre:

<https://wiki.uni-foundation.eu/display/EWP/About>

European Student Identifier:

<https://wiki.geant.org/display/SM/European+Student+Identifier>

European Student Card Initiative:

<https://erasmus-plus.ec.europa.eu/european-student-card-initiative>

EWP Statistical Portal:

<https://stats.erasmuswithoutpaper.eu/>

Erasmus+ App

<https://erasmusapp.eu/>

European Grade Conversion System:

<http://egracons.eu/>

Annex 1: Sample questions for site visits

The following questions can be used by National Agencies during monitoring visits to ECHE holders.

Core mobility principles

Questions for staff:

Course catalogue, recognition, credit transfer

- What are the procedures for preparing, modifying, approving and completing the learning agreement?
- Are the procedures the same for all departments/faculties?
- How are mobility HEI partners chosen?
- Are inter-institutional agreements made taking into consideration the compatibility between the study programmes on offer by the HEIs?
- How and when are the results registered in the academic records system?
- Who is responsible for registering the results?
- How does the mobility period appear in the diploma supplement?
- Are there any other aspects which you would like to discuss?
- Do you have good practices you would like to share?

Student support

- How do you organise the grant payment to students? Which departments are involved? How do you assure timely payment?
- Does your institution have a complaint procedure in place? If yes, to which participants does it apply? Who is involved in the follow-up? How are students made aware of the procedure?
- In preparation of the mobility, what information do you offer to the participants? How and when do you offer this information?
- Do you have a system in place to support students in the visa procedures and to get an insurance, when needed?
- Do you have a system in place to support incoming students in their research for accommodation?
- Do you provide information to incoming students about student support and services (e.g. networks of mentors and buddies, student organisations, student unions, student representatives, ombudspersons)?

Questions for students:

Preparation, planning and recognition

- Who is responsible for the preparation and approval of the learning agreement? What about possible changes during the exchange? Did you carry out all the activities listed in table A of the learning agreement? Did you have to use tables A2 and B2 for modification?
- Who is responsible for recognition of studies after the exchange? Was the recognition process smooth? Were all the activities listed in table A recognised as appears in table B?

- Did all the activities carried out count towards your degree? Are they registered in your certificate of studies/diploma supplement?
- Were there difficulties in recognition? Why?
- Did you understand the rules concerning conversion of your grades?
- Did you know how and where to lodge a complaint if you thought you had not been treated fairly?
- When drafting the Learning Agreement, was the equivalence of the ECTS respected? If not, how were they applied?

Student support

- When did you receive your grant payment?
- Did you know who to contact if there was an incident during your mobility? Did you know how and where to submit a complaint if necessary?
- What specific information and support did you receive from your receiving institution before and during your mobility (on accommodation, student support and services, insurance and visa if applicable)?
- Any general comments on what went well or on any issues you faced?

Inclusion

Questions for staff

- Does your institution have measures or a strategy in place to ensure inclusive mobility? Do you have specific targets and are they monitored?
- How do you promote the participation of students with fewer opportunities in mobility projects and cooperation activities? Who participates in outreach activities, with whom do collaborate? Are the activities followed-up?
- What information do you provide to your students to promote the participation of students with fewer opportunities?
- Which measures has your HEI put in place to allow outgoing mobility of students with fewer opportunities?
- How do you organise the selection procedure for outgoing students or cooperation projects? Are the selection criteria public? Is there a complaint procedure in place?
- Has your HEI provided the incoming students with the same services as local students or different ones (e.g. free accommodation, free cafeteria or additional institution funding)?
- Have you involved colleagues from the disability or inclusion offices, during the life cycle of your Erasmus+ Project?
- What information and assistance do you give to students with physical, mental or health related conditions (both outgoing and incoming participants)?
- Do you provide information on the blended mobility opportunities to the students who are reluctant in going on mobility and students with fewer opportunities?

Questions for students

- Did you receive information on the top-up amount to the individual support for students with fewer opportunities, on facilities or inclusion support?
- Were you made aware of the option of blended mobility?

- How was the selection procedure implemented? Did you know how and where to submit a complaint if you thought you had not been treated fairly?
- Any other comments on inclusion and equal treatment of participants?

Digitalisation

Questions for staff

- How is your HEI implementing the digitalisation of Erasmus+?
- Can you describe other ways your institution has committed to the digitalisation of the Erasmus+ programme?
- What are the HEI services that the student can access through digital tools? (mobile App, Erasmus Student card)
- Does your institution digitalise Erasmus+ bilateral intra-EU inter-institutional agreements (IIA) through the Erasmus without paper network? Did you encounter difficulties? How have these been solved? Do you have any outstanding issues that you need guidance on?
- What is the progress of your institution in the process of using digital learning agreements for outgoing and incoming Erasmus+ students on an intra-European mobility for studies?
- Do you promote the Erasmus+ App to both incoming and outgoing students? How? Do you update information in the App? Who is responsible for this task?
- Have you recruited new resources or trained those already working on the Erasmus Programme, to implement digitalisation?

Questions for students

- Were you aware of the Erasmus+ App? Did you use information provided in the App? Did you update information yourself?
- Did you experience any difficulties having documents signed digitally? If so, what difficulties?

Annex 2: Evaluation grids

ECHE Monitoring Guide Evaluation Grids

Core mobility principles	Strong	Fair	Weak
1. Course catalogue⁷			
1.1 Timely publication (=availability before the signature of the learning agreement), completeness and regular update of the course catalogue for the next semester/academic year			
1.2 Accessibility of the course catalogue, on the website, available in a widely spoken language			
2. Recognition			
2.1 Learning agreement fully completed and signed by all parties in advance of mobility with all the activities clearly described for the outgoing students			
2.2 Timely dispatch of the transcript of records (sent within 5 weeks to partner institutions) for the incoming students			
2.3 Full automatic recognition of study mobility (using ECTS or compatible system) in a reasonable time, virtual part included			
2.4 Recognition of student mobility for traineeships (except recent graduate traineeships), virtual part included			
2.5 HEI use of the Diploma Supplement ⁸			
2.6 Recognition of staff mobility , virtual part included			
3. Grading systems, credit transfer and grade conversion			
3.1 Availability of full and accurate information on the grading system and grade distribution used in institutions/faculties (if applicable)			
3.2 Full and accurate information on procedures of credit transfer and grade conversion provided to the student			

⁷ Recommended elements: course title, content, ECTS credits, learning outcomes, language of instruction, length, general information, restrictions to mobile students. See more information on the course catalogue in the [2015 ECTS users' guide](#).

⁸ Information on the Diploma Supplement and Full Automatic Recognition can be found in the [ECHE guidelines](#) and the [Council Recommendation on promoting automatic mutual recognition](#)

4. Student support			
4.1 Timeliness of grant payment to students			
4.2 Availability of a mechanism to report complaints and issues during mobility for all mobile participants			
4.3 Accessibility and timely provision of assistance for visa and insurance			
4.4 Accessibility and provision of assistance in search of accommodation			
4.5 Provision of and information on student support and services			

Evaluation criteria	Core mobility principles
Strong	1.1 The course catalogue is available in time for the student to prepare the learning agreement; at least 80% of students assess the catalogue as up-to-date, available in time and sufficiently complete for their needs; 1.2 The course catalogue is available in a widely spoken language and the main language of instruction; The catalogue can be accessed or easily found through the website's search engine or from the homepage. 2.1 The institution has ensured that 90-100% of all learning agreements of its outgoing students have been signed by all three parties before the start of the mobility; 2.2 The institution has dispatched 90-100% of the transcripts of records of its incoming students within 5 weeks after the end of the mobility period; 2.3 100% of the learning components in table B are automatically recognised – (in the case of recent graduates other tools may be used (e.g. Europass); 2.4 80-100% of traineeships are recognised (e.g. using ECTS credits or equivalent); 2.5 The institution does at least four of the following: issues a Diploma Supplement (DS) for all graduates automatically, issues a DS free of charge, issues a DS in at least one of the major European languages in addition to the national language, issues a DS in a digital format, lists recognised modules/units/training activities undertaken during the mobility period of a student in the DS, indicates in the DS where the activities were carried out, publishes its policy on issuing the DS on its website. 2.6 80-100% are satisfied with the level of recognition, and there is a clear institutional policy for recognising staff mobility. 3.1 Full information is provided on the website and in the course catalogue (see ECTS users' guide requirements http://ec.europa.eu/education/resources/european-credit-transfer-accumulation-system_en); The ECTS Grade Distribution Tables or another widely used system are used. 3.2 80-100% of the students are satisfied with the information provided on the procedures, and information on credit transfer and

	grade conversion is available on the website of the institution. 4.1 90-100% of students receive their grant payment in time, according to their signed grant agreement 4.2 The institution has in place a mechanism to report complaints and issues during the mobility (for incoming and outgoing students) and this mechanism is clearly communicated to students before and during their mobility; 4.3 80-100% of incoming and outgoing students are satisfied or very satisfied with the visa and insurance assistance provided; 4.4 80-100% of incoming students are satisfied or very satisfied with the accommodation assistance provided; 4.5 80-100% of incoming and outgoing students are satisfied or very satisfied with the information and services provided.
Fair	1.1 The course catalogue is available before the start of the academic year: if 50-79% assesses the catalogue is up-to-date, available in time and sufficiently complete for their needs; 1.2 The course catalogue is partially available in a widely spoken language and/or the language of instruction; catalogue can be accessed with some difficulty from the homepage. 2.1 75-89% of all learning agreements have been signed by all three parties before the start of the mobility; 2.2 The institution has dispatched 80-89% of the transcripts of records of its incoming students within 5 weeks after the mobility period; 2.3 N/A 2.4 50-79% of traineeships are recognised (e.g using ECTS credits or equivalent); 2.5 The institution does at least three of the following: issues a Diploma Supplement (DS) for all graduates automatically, issues a DS free of charge, issues a DS in at least one of the major European languages in addition to the national language, issues a DS in a digital format, lists recognised modules/units/training activities undertaken during the mobility period of a student in the DS, indicates in the DS where the activities were carried out, publishes its policy on issuing the DS on its website. 2.6 50-79% are satisfied and there are instances where staff mobility was acknowledged and appreciated. 3.1 Basic information on the grading system is available; 3.2 Other grade distribution tables are being used and/or 50-79 % of the students are satisfied with the information provided on the procedures. 4.1 60-89% of students receive their grant payment in time, according to their signed grant agreement 4.2 The institution has in place a mechanism to report complaints and issues during the mobility but does not advertise this mechanism specifically to mobile participants; 4.3 60-79% of incoming and outgoing students are satisfied or very satisfied with the visa and insurance assistance provided; 4.4 60-79% of incoming students are satisfied or very satisfied with the accommodation assistance provided; 4.5 60-79% of incoming and outgoing students are satisfied or very satisfied with the information and services provided.

Weak	1.1 The course catalogue is not available before the start of the academic year or not at all: less than 50% assess the catalogue as up-to-date, available in time and sufficiently complete for their needs; 1.2 The course catalogue is not available in a widely spoken language; it is difficult and time-consuming to find the course catalogue, if it can be found at all. 2.1 Less than 75% of all learning agreements have been signed by all three parties before the start of the mobility, and there are cases where nothing has been agreed before the mobility; 2.2 The institution has dispatched less than 80% of the transcripts of records of its incoming students later than 5 weeks after the mobility period; 2.3 Less than 100% recognition of successfully achieved learning during mobility; 2.4 No mechanisms are in place for recognition of traineeships; 2.5 The institution does two or less of the following: issues a Diploma Supplement (DS) for all graduates automatically, issues a DS free of charge, issues a DS in at least one of the major European languages in addition to the national language, issues a DS in a digital format, lists recognised modules/units/training activities undertaken during the mobility period of a student in the DS, indicates in the DS where the activities were carried out, publishes its policy on issuing the DS on its website. 2.6 Less than 50% are satisfied and no measures are in place for recognition of staff mobility. 3.1 No information is provided; 3.2 No grade distribution table is used and/or below 50% of the students are satisfied with the information provided on the procedures. 4.1 Less than 60% of students receive their grant payment in time, according to their signed grant agreement. 4.2 The institution does not have in place any mechanism to report complaints and issues during the mobility; 4.3 Less than 60% of incoming and outgoing students are satisfied or very satisfied with the visa and insurance assistance provided; 4.4 Less than 60% of incoming students are satisfied or very satisfied with the accommodation assistance provided; 4.5 Less than 60% of incoming and outgoing students are satisfied or very satisfied with the information and services provided.

Inclusion	Strong	Fair	Weak
a) Existence of measures and quantitative and qualitative targets to ensure inclusive mobility			
b) Awareness of the national criteria for the top-up to individual support for students/recent graduates with fewer opportunities			
c) Outreach actions towards participants with fewer opportunities to encourage them to take part in mobility or cooperation activities.			
d) Fair and transparent selection procedures for outgoing students for mobility or cooperation activities.			
e) Use of blended mobility as one of the tools to make mobility more inclusive			
f) Information provision for incoming students with fewer opportunities, in particular students with physical, mental or health related conditions			

Evaluation criteria	Inclusion
Strong	a) The institution has devised an inclusion strategy that includes quantitative and qualitative targets; it is widely published on the website and prominently displayed to students who are researching mobility opportunities (incoming and outgoing). The strategy has a dedicated part on mobility. b) The institution does all of the following: criteria and application procedure is available on the website of the institution and is included in presentations to outgoing students/recent graduates. Information has been shared with inclusion services/student services that assist students with fewer opportunities. c) The institution does at least two of the following: it works with student unions or unions of people with fewer opportunities on outreach; the institution issues targeted communication towards participants with fewer opportunities; the institution has inclusion officers; the institution has mobility coordinators that work with student counsellors or staff that work directly with students with fewer opportunities. d) The institution has a fair and transparent selection procedure in place; the selection criteria are available on their website. The institution also has a clear procedure in place for complaints and requests for justifications of selection. e) The institution promotes short-term blended mobility to all students, emphasising the opportunity for students with fewer opportunities. f) The institution has detailed information on their website on services available to incoming students with fewer opportunities, in particular students with physical, mental or health related conditions.
Fair	a) The institution can demonstrate some inclusion measures/strategies but they do not target specifically the mobility of students. b) The criteria and application procedure is available on the website of the institution. c) The institution does at least one of the following: it works with student unions or unions of people with fewer opportunities on

	outreach; the institution issues targeted communication towards participants with fewer opportunities; the institution has inclusion officers; the institution has mobility coordinators that work with student counsellors or staff that work directly with students with fewer opportunities. d) The institution has a selection procedure in place but it is not available or up to date on the website. e) The institution offers some general information on blended mobility. f) The institution has limited information on their website on services available to incoming students with fewer opportunities, in particular students with physical, mental or health related conditions.
Weak	a) The institution has not devised and published an inclusion strategy. b) The institution does not have information on the criteria for the top up on their website. c) The institution does not do any of the following: it works with student unions or unions of people with fewer opportunities on outreach; the institution issues targeted communication towards participants with fewer opportunities; the institution has inclusion officers; the institution has mobility coordinators that work with student counsellors or staff that work directly with students with fewer opportunities. d) The institution does not have a fair selection procedure in place or the procedure is not transparent. There is no opportunity for students to get information on their selection results. e) The institution does not mention specifically the option of blended mobility to students. f) The institution does not have information on their website on services available to incoming students with fewer opportunities, in particular students with physical, mental or health related conditions.

Digitalisation	Strong	Fair	Weak
a) Digitalisation of bilateral intra-European inter-institutional agreements (IIAs)*			
b) Digitalisation of learning agreements for intra-European study mobility for incoming and outgoing students*			
c) Commitment to the digitalisation of the Erasmus+ programme			

Evaluation criteria	Digitalisation
Strong	a) Institution has digitalised over 80% of Erasmus+ bilateral intra-European inter-institutional agreements through Erasmus Without Paper Network.* b) 80% of outgoing and incoming Erasmus+ students on an intra-European mobility for studies in the on-going academic year have been issued an online learning agreement through the Erasmus Without Paper Network.* c) The institution shows commitment to the digitalisation of the Erasmus+ programme by implementing at least two of the following aspects; adoption of the European Student Identifier, the promotion of the Erasmus+ mobile application, the European student card.
Fair	a) Institution has digitalised 50-79% of Erasmus+ bilateral intra-European inter-institutional agreements through the Erasmus Without Paper Network.* b) 50-79% of outgoing and incoming Erasmus+ students on an intra-European mobility for studies in the on-going academic year* have been issued an online learning agreement through the Erasmus Without Paper Network.* c) The institution shows commitment to the digitalisation of the Erasmus+ programme by implementing at least one of the following aspects; adoption of the European Student Identifier, the promotion of the Erasmus+ mobile application, the European student card.
Weak	a) Institution has digitalised less than 50% of Erasmus+ bilateral intra-European inter-institutional agreements through the Erasmus Without Paper Network.* b) Less than 50% of outgoing and incoming Erasmus+ students on an intra-European mobility for studies in the on-going academic year have been issued an online learning agreement through the Erasmus Without Paper Network.* c) The institution does not show commitment to the digitalisation of the Erasmus+ programme.

*Monitoring to start as of January 2023. NAs are encouraged to focus on giving guidance and support on this topic and help institutions complying with digitalisation requirements. Institutions are dependent to an extent on their partners in order to fully comply with their digitalisation commitments. NAs should keep this in mind during monitoring and ensure that external factors do not negatively influence their assessment of the institutional commitments and compliance with the digital transition.

Contact

The EAC Higher Education Erasmus+ team



European Commission

DG Education and Culture

Unit B.1 – Higher Education

Joseph II, 70

B-1040 – Brussels/Belgium

<https://erasmus-plus.ec.europa.eu/>

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