# EFEE

# educAItion

# Call for Tender for Expert Researcher

## *educAItion*

**Preparing for the Use of Artificial Intelligence in Education: Benefits, risks, opportunities and challenges**

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| Deadline to respond: | **15 May 2023** |
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# Description

The European Federation of Education Employers is pleased to launch a call for a subcontractor to provide research expertise in the framework of the implementation of the 2-year project '*Preparing for the Use of Artificial Intelligence in Education: Benefits, risks, opportunities and challenges',* supported by the European Commission under the European Social Fund+ (ESF+) Social Prerogatives and Specific Competencies Lines (SocPL).

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# Background

## The organisation – EFEE

The European Federation of Education Employers (EFEE) is a recognised European social partner organisation for education employers. EFEE represents in total 61 education employers organisations of all sectors of education from pre-school to higher education, research, and VET, in 27 European countries. EFEE's membership includes ministries of education, local government associations, school boards' and school heads' associations, non-public and private school associations, conferences of university rectors, and networks of private universities.

Our mission is to improve the quality of teaching and school management through European cooperation and dialogue. On the basis of the European Pillar of Social Rights, we raise awareness of and increase commitment to the European policy agenda and influence European policy by making the voices of our members heard. As an officially recognised European social partner in education, we, thereby, are in constant dialogue with EU institutions as well as other European partners such as trade unions and various educational networks. Against this background, one of our declared core tasks is project management. EFEE continuously runs a great number of projects throughout the year. The aim of these projects is to foster mutual learning and exchange on current challenges and opportunities in the education sector. There are two core features characterising our projects: firstly, their transnational character; and secondly, their strong evidence base. Regarding the former, participants are provided with the opportunity to travel to other European countries and to have exchanges with our members from all over Europe. Regarding the latter, an external expert is hired for every project to ensure the high scientific quality of our project results (please find a more detailed description of the expected tasks of an expert in section 'Tasks to be performed by the succesful candidate' of this document – page 10).

EFEE is responsible for the day-to-day management of the project. This includes the project coordination (organisation of activities), supervision related to the project objectives (producing outcomes), and the administrative and financial tasks that come with it. EFEE will also draft policy recommendations based on the outcomes of the project. EFEE's General Secretary Daniel Wisniewski will be the project coordinator and he will be assisted with the implementation of the project by EFEE Senior Project Manager Silvia Pesini Escartín.

## The project – EducAItion

### Purpose of the project

This 2-year project, in which a diverse range of education stakeholders will participate, is an education employers' capacity-building project oriented to strengthen the position of this social partner in the social dialogue with regard to the subject at stake. The objective that it pursues is that education employers acquire a greater understanding of the role of management in the provision of AI tools in educational institutions and of AI literacy and training for educational staff and students. In addition, it aims to explore the evolution of the role of teachers in these increasingly digital environments. As part of this project, we will also look for more appropriate ways to cooperate with IT companies to develop education-needs-based AI tools. As a result of the findings obtained from this project, education employers will be better prepared to debate the topic of Artificial Intelligence in education, both at the national and European levels, with the trade unions.

This project will provide relevant data on the topic of AI in education through the exploration of its potential benefits and risks, and the challenges and opportunities for its implementation in different contexts across Europe. As AI is progressively introduced into education, educators, policymakers and technology providers must collaborate to ensure its safe and responsible use. Preparing for its introduction to education and for its use, as well as not missing the possibilities it can bring is paramount to the education sector. While AI has the potential to transform various aspects of education, it is important to recognise the role of teachers remains essential and irreplaceable. As a result, this project will also take part in exploring the evolution of the role of teachers due to AI integration in education.

### Summary of the project

The presence of Artificial Intelligence in the education sector is a phenomenon that is rapidly growing worldwide. There is, however, an ongoing debate and discussion around the positive impact of its use, and the safety and ethical risks that it entails. With this project, we will delve into the benefits, risks, opportunities and challenges of using AI in education.

Its potential to transform educational practices and alleviate the administrative workload of teachers and management, along with the need for upskilling and continuous training, calls for important conversations between education employers and teachers. Both social partners need to be duly prepared, open and willing to innovate, to effectively benefit from this new situation.

This research-oriented project, therefore, aims to prepare education employers for the reality of AI in education by analysing their role in 1) the introduction and supply of AI tools in educational institutions; 2) the catering of support and

training for educational staff in the usage of AI tools in education, and; 3) the provision of AI literacy for the safe and sustainable use of AI tools.

In addition, with the growth of the market of AI for education, more opportunities and risks have emerged related to the infiltration of commercial IT companies in the sector. Opportunities such as the cooperation between these companies and educational institutions in the designing of AI tools to address real needs that schools have; and risks like the financial interests of such companies interfering with the real objectives of education systems, should also be explored.

Through desk research, live discussions, and the exchange of best practices, we will develop a framework on how education employers can make the best use of AI in education while following the European Union's ethical and safety guidelines.

## Main objectives of the project

- o Raise awareness among education employers and pedagogical centres on the possible safety and privacy risks related to the use of AI by the administration, teachers, and students, and provide guiding examples through the exchange of good practices and discussion.

- o Explore the evolution of the role of teachers due to AI integration in education to better understand the best ways of providing professional development programmes to equip them with the necessary skills.

- o Explore how to best introduce AI literacy in the curriculum to empower students to engage with AI in a safe and advantageous manner.

- o Empower education employers to tackle the digital divide and promote inclusion by exploring the possibilities of:
  - o Collaboration and partnerships among governments, educational institutions, technology providers, and other stakeholders who can facilitate the provision of resources, infrastructure, expertise, and funding.
  - o Policy and funding support to prioritise equitable access to AI technologies in education. This includes funding initiatives to support the acquisition of devices, infrastructure development, and training programs.

- o Explore the best ways to leverage the use of AI tools for the promotion and support of environmental sustainability.

## Outputs of the project

The EducAItion project will produce:

A **survey** to map the level of presence of Artificial Intelligence and educational technologies in formal educational institutions in Europe.

A first **workshop** on the topic of '*Artificial Intelligence for the purpose of management of educational institutions'* to be held in Belgium by consortium member GO! Education of the Flemish Community. AI is currently the most commonly used system in the education sector to alleviate administrative tasks. In addition, the collection of data from AI tools could be used for 'learning analytics' in order to make data-driven decisions such as the optimal delivery of educational opportunities or identification of students at risk of failure. The use of these tools, however, raises risks linked to the biases that these databases and computational approaches for decision-making might have. In this workshop, delegates will exchange best practices and tools and discuss the ethical, financial and safety implications of AI tools for the management of educational institutions.

A second **workshop** on the '*Evolution of the role of teachers as a result of the introduction of AI in teaching and learning'* to be held in Greece by consortium member Palladio School. The aim of this workshop will be to discuss the future requirements and needs of teachers concerning AI training and continuous development and the need for support from education employers in this regard. In addition, during this workshop, education employers will be equipped with the necessary leadership tools to create and support the **culture of innovation** in their respective institutions, essential for teachers and other educational staff to be open and willing to accept the introduction of AI tools in education.

A third and last **workshop** on the topic of '*Cooperation between educational institutions and IT companies'* to be held in Ireland by consortium member Education & Training Boards Ireland. The infiltration of commercial IT companies in the education sector can have many negative implications that need to be explored as their economic interests might not be aligned with those of students or schools. On the other hand, partnerships between schools and IT companies present a world of opportunities that can allow schools to work closely with the designers of AI tools to address real needs. With this workshop that will take place in Dublin, digital hub for big IT companies such as Microsoft Google and Facebook, we aim at providing useful information for education employers as to what are the opportunities and challenges for the establishment of such cooperation.

**Guidelines** on the '*implementation of **best practices of AI in education** in different formal education contexts in Europe'*. These guidelines will be developed by consortium members based on the findings of the project.

A final research report will be developed by the expert researcher feeding from desk research, the aforementioned survey, and the outcomes of the three cornerstone events. The final research report will include the guidelines developed

by consortium members based on the findings of the project and will serve as a **framework** for how education employers can make the best use of AI in education.

**Policy recommendations** based on the findings of the project developed by the project coordinator (EFEE) with the input from consortium members.

A final movie for promotional and dissemination purposes.

## Timeline of the project

In order to deliver on the project's objectives, we will organise three in-person events in the timeframe of 2024-2026. These workshops, taking place in Belgium, Greece, and Ireland, will have a duration of 1,5 days each.

In addition, the Project Advisory Group and selected expert researcher, will meet three additional times online to steer the direction of the project.

Please find the preliminary timeline below:

| Date | Activity | Location |
|---|---|---|
| May 2024 | Kick-off Advisory Group meeting | Online |
| September 2024 | Advisory Group meeting | Online |
| October 2024 | 1st Workshop | Belgium |
| November 2024 | Advisory Group meeting | Online |
| April 2025 (tbc) | 2nd Workshop | Athens, Greece |
| May 2025 | Advisory Group meeting | Online |
| November 2025 (tbc) | 3rd Workshop | Dublin, Ireland |
| January 2026 | Advisory Group meeting | Online |
| February 2026 | Publication of the Final Research Report/Dissemination Period | Online |

## Advisory Group meetings

The Advisory Group meetings will bring together representatives from all the official consortium partners to provide guidance, monitor the project

developments, and promote active involvement in the project meetings and dissemination actions among their affiliates; and the expert researcher. The focal point of these meetings is to agree on general concepts, set concrete goals, select specific peer learning topics, and prepare the groundwork for project events. In total, four advisory group meetings will take place during the course of the project.

### Workshops

The objective of the workshops, which will each last one day and a half, is to provide Advisory Group Members, other education employers representatives, and education stakeholders with a platform to exchange, peer learn, and discuss the topics identified during Advisory Group meetings in greater depth. The workshops will also include local school visits, allowing participants to gain in-depth practical on-site knowledge on effective management of educational centres in the context of AI in education, and therewith bound challenges and opportunities by engaging in a dialogue with school representatives.

### Dissemination period

The dissemination period will be devoted to sharing the results of the project, including the outcomes of the workshops, examples of best practices uncovered in the course of the project, the research report and guidelines, policy recommendations, and foreseen follow-up actions. The aim of the dissemination period is to promote the project outcomes and to ensure the sustainability and impact of the project beyond its lifespan.

## The expert researcher

In order to ensure that our project has a strong evidence base, we deem it crucial to invite an external expert researcher to assist us with the desk-research and with the development and analysis of a comprehensive study on the use of digital tools and Artificial Intelligence tools in different levels of education in European countries. The expert researcher is expected to write a substantial research report and outcome document analysing and comparing the theoretical framework from literature study with the practical knowledge gained through the survey and workshops. By investigating the use of digital tools and Artificial Intelligence tools by formal education providers and comparing this with the knowledge gained through hands-on experience in the host countries, the research report will aim to develop a concrete and well-covered outline for all the relevant stakeholders. This research report will feed into the final guidelines and policy recommendations.

Therefore, we expect the expert researcher to have proven research experience and extensive knowledge of the topics at stake. Preferably, the expert researcher will furthermore showcase a significant understanding of social dialogue structures in education in order to identify the most pressing challenges and opportunities accordingly. The total budget for subcontracting these tasks is €30.000 (about 60 working days at the rate of €500/day) based on previous experiences with external experts.

## Tasks to be performed by the successful candidate

The expert is expected to perform the following tasks in the time framework from June 2024 to March 2026:

1. **Participate** in a pre-project meeting with EFEE (online), three meetings with the Project Advisory Group (online) and three in-person workshops.

2. **Conduct** desk research to map the use of Artificial Intelligence and educational technologies by formal education providers in Europe and develop a substantial research report and outcome document analysing and comparing the theoretical framework from the literature study with the practical knowledge gained through the workshops.

3. **Investigate** the use of digital and Artificial Intelligence tools in the managerial, teaching and student levels in different European countries and compare this with the knowledge gained through hands-on experience in the host countries, while looking for a redefinition of the concept of teachers working time.

4. **Develop**, with the input from the project advisory group, an online survey to be carried out amongst EFEE and consortium member organisations to get insight into their current knowledge, practices and challenges when it comes to the role of education employers in the provision of safe and ethical AI tools and of training and support for their use.

5. **Develop,** with the input from the project advisory group, interview questions for the activities at local/national level to identify practical and concrete ways to approach the topic.

6. **Scientifically accompany** the peer learning activities in Belgium, Greece, and Ireland and subsequently, **draft** a reflection report based on the evaluation and analysis of the findings gained after each activity when it comes to the role of education employers in the provision of safe and ethical AI toold and of training and support for their use. The reflection

reports will be presented to the Advisory Group members for input and approval.

7. **Draft** a final project research report (including Executive Summary), outlining the outcomes of all project activities (incl. survey, desk research, workshops) and drawing conclusions on the best way of using of Artificial Intelligence and educational technologies by formal education providers in Europe.

## Requirements to be a successful candidate

EFEE requires the expert researcher (hereafter, Contractor) to provide an objective and scientific perspective along with expertise on the issue at stake while carrying out the tasks outlined above. Therefore, the Contractor is expected to display the following competences:

o Proven (research) experience and extensive knowledge of the use of digital and AI tools in the education sector .
o Significant understanding of social dialogue structures in education is preferable in order to identify the most pressing challenges and opportunities accordingly.
o Experience in conducting surveys/interviews in the education sector.
o Understanding of the role of employers and social partners in the education sector as well as an overall understanding of the education sector (both on the European and national level).
o Ability to communicate fluently verbally and in writing in English (at least C1 level). Additional European languages such as French, Dutch and Greek will be considered an asset.

The Contractor contributes to the successful development of the project as a whole by actively participating in various project activities and meetings. The Advisory Group is the body entitled to guide the project/research implementation as concerns its organisation and evaluation.

## Payments and standard contract

The contract signed between EFEE and the Contractor is subject to the Grant Agreement signed between EFEE and the European Commission for this project initiative. Payment of the fees defined in the contract will be made in two instalments dependent on the Contractor carrying out the relevant stages of work as listed above.

1. A first instalment amounting to 50%, issued after signature of the contract during the second month of the action.

2. A second instalment for the remaining payment issued after completion, delivery and approval by EFEE of the final outcome.

Payments will be done by bank transfers to a bank account for which the Contractor will communicate the full details.

The contractual agreement is based upon and regulated by the European Commission's rules, provisions and requirements as set out in the project agreement with the European Commission, DG EMPL and applicable Belgian law. The Contractor is obliged to fulfil the described tasks and duties of work to receive the final payment according to the contract.

EFEE has the right, based on Belgian Law, to terminate the contract when the Contractor cannot perform the agreed tasks and duties accordingly. Any conflicts of interests or disputes concerning the validity of this arrangement, the construction of its terms, and the interpretation of the rights and duties of the parties in the contract shall be governed by Belgian Law.
The contract may not be transferred without the parties' written agreement.


# Price

## Agreed amount

Subject to the final Grant Agreement established between the European Commission and EFEE for the purpose of this project, the total amount available for the tasks described here above during the project lifetime (01/04/2024 – 31/03/2026) will be of maximum €30.000 (about 60 working days at the rate of €500/day) of including all taxes (such as, e.g. VAT). The final salary amount will be paid depending on the previous experience of the contractor with regards to the above-mentioned tasks.

## Other arrangements

**Expenses**: The Contractor is reimbursed, on receipt of full documentation according to the European Commission's requirements with regards to travel – economy flight and train tickets –, accommodation expenses, and transfer to and from the airport (by public transportation; taxis not reimbursed) for their participation in the in-person events (3 workshops).

**Processing personal data**: The contracting party accepts that the Contractor is free to use the data collected and the reports written in this project as part of

their own academic reports and articles, as long as they include the relevant references to the project.

However, in order to fulfil or respect the modernised Convention 108 (the regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000) and EU General Data Protection Regulation (GDPR) on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data:

1. The Contractor must process personal data under the agreement in compliance with applicable EU and national law on data protection (including authorisations or notification requirements);
2. The Contractor may grant its personnel access only to data that is strictly necessary for implementing, managing and monitoring the agreement;
3. The Contractor must adopt appropriate technical and organisational security measures having regard to the risks inherent in the processing and to the nature of the personal data.

## Selection criteria

Aside from the above stated requirements, the selection process will be based 1) on acceptance of the tender offering the best price-quality ratio and 2) on the availability during the duration of the project for the requested tasks. The Contractor is selected according to the standards of selection that have been developed by EFEE. Main selection criteria are the expertise and capacity to deliver the work tendered for, the price-quality relation, the methodological quality and the tenderer's work experience.

It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the award criteria.

### Award criteria

The contract will be awarded to the tenderer whose offer represents the best value for money, taking into account the following criteria:

1. Evidence track record of proven research experience and extensive knowledge of the use of digital and AI tools in the education sector (and preferably of social dialogue structures in education as well).
2. Proficient capacity in the English language (additional European languages such as French, Dutch and Greek will be considered an asset)
3. Understanding of the nature of the assignment
4. Capacity to work in a team project
5. Ability to meet deadlines
6. Ability to meet budget allowances
7. Availability to attend activities and meetings

# Content and presentation of the bids

## Content of the bids

The bids should contain a detailed explanation of the qualifications and the expertise of the potential contractor, e.g. information on references from the contractor on similar projects already handled, to demonstrate their experience and capability to succeed in performing the tasks as set out in section 2 of this tender.

The bids should include a detailed description of the **methodology and tools** applied to implement a project plan with **detailed time and cost planning**. The potential contractor is also requested to send a budget listing the costs by task including a fair estimation of the number of working days and the number of people participating in the tasks.

## Presentation of the bids

Replies have to be presented by **15 May 2024 at the latest** to silvia.pesini@educationemployers.eu

Subject: Expert Researcher for EducAItion